



Maitre'D®

Software that serves you better

Maitre'D Back Office User Manual



The **Maitre'D** Back Office Start-up Guide is intended primarily for restaurant owners and managers, but is equally suited for corporate IT departments.

This manual provides general information on the use of the **Maitre'D** Back Office and introduces the reader to the many features of **Maitre'D**.

It must be used by first time users to familiarize themselves with the **Maitre'D** Back Office, but can also be used by seasoned users who want to learn more on how to apply other features of the **Maitre'D** Back Office.

The topics in this manual have been organized to closely follow the **Maitre'D** features as they are presented in the Point of Sale (POS) module of the **Maitre'D** Back-Office.

This guide will provide the reader with step by step instructions to easily locate the features in the **Maitre'D** Back-Office application.

Chapter 1: Checking the End of Day explains the EOD process and why it is important to check it has been done.

Chapter 2 and 3: Modifying Items and Creating New Items introduces the reader to the sales items, how to modify prices and how to create new items.

Chapter 4: Divisions explains in detail what a division is, its links with the sales items, taxes and promotions.

Chapter 5 and 6: Variable Lists, Item Classes and Preferential Screens explain the options available to customise order screens.

Chapter 7: Modifiers deals with the configuration of remarks required after selecting specific sales items to ensure correct information is displayed on checks.

Chapter 8: Employee Setup and Configuration details how to add and manage employees.

Chapter 9: Promotions explains the options available for basic promotion.

Chapter 10, 11 and 12: Messages explains how to modify messages on receipts, pos terminal and how to create employee messages.

Chapter 13: Backups describes how to fully backup your system.

Chapter 14: Report Center gives an overview of the report center module.

Chapter 15: Troubleshooting will show you basic tips on how to diagnose basic system problems.



Table of Contents

Checking the End of Day (EOD) has been done.....	4
Modifying Item Prices.....	10
Creating New Items.....	20
Divisions	33
Variable Lists and Item Classes	35
Preferential Screens	51
Modifiers.....	63
Employee Setup and Configuration.....	85
Promotions	99
Modifying the Message on Customers Receipts.....	107
Modifying the POS Message.....	110
Message Center	112
Backups	120
Report Center	127
Troubleshooting.....	130



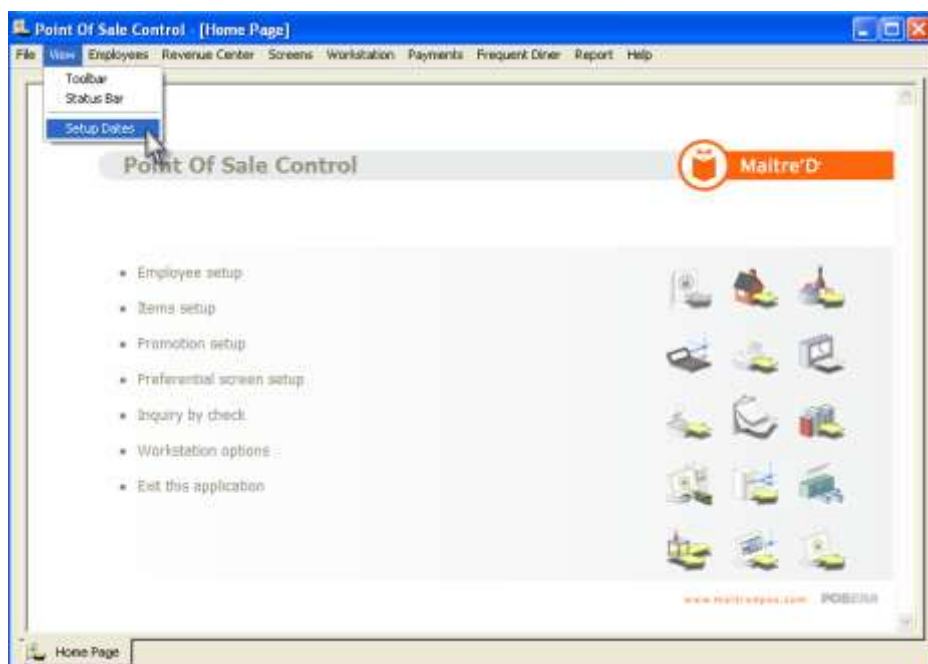
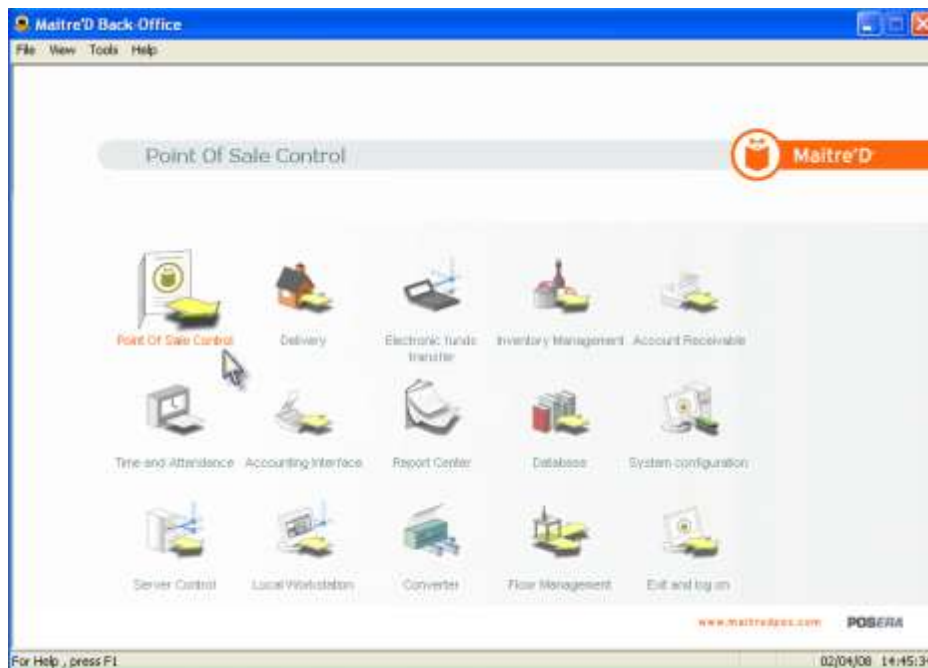
Checking the End of Day (EOD) has been done

Every day it is crucial to check the end of day has been done on your Maitre'D back office.

This is to ensure your sales figures have been finalized for each accounting day and therefore you can start the new accounting day with 0.00 sales.

You can check from a) the back office and also from b) a point of sale (POS)

a) From the back office select **Point of Sale Control / View / Setup Dates**





First Day of the Week : Monday

Start of Year : 01-01-2008

End of Year : 12-31-2008

Last Closing Date : 01-14-2008

Daily Summary Number : 0

Close

Assuming today's date is January 15th 2008; the **Last Closing Date** should be yesterday's date – January 14th 2008.
If this is the case the end of day has been processed and you can now start a new business day.

b) From the POS , log on to **FUNCTION** with your manager number, or press **FUNCTION** and swipe your employee card or scan your finger in the biometric device, and select **MANAGER MENU**

15 JANUARY 2008 14:03 www.maitre'd.com Maitre'D

2005 Demo POS 11 MODELLUNCH

TO BEGIN A GUEST CHECK:
ENTER YOUR SERVER # (ENTER)
ENTER YOUR PASSWORD #
ENTER THE TABLE # (ENTER)
ENTER # OF CUSTOMERS (ENTER)

SERVER NUMBER => 30

7 8 9 ENTER
4 5 6 READING
1 2 3 FUNCTION
0 00
BACK EXIT

ROOM CHARGE
ACCOUNTS AR
UPDATE

SPECIAL MENU

MANAGER MENU
SERVER TRANSFER
TABLE TRANSFER
NO SALE
CHANGE PASSWORD

EXIT

Select **MAIN READING**

The sales figures should be **0.00**



FINANCIAL REPORT RESTAURANT SUMMARY		SAT JANUARY 5, 2013 14:50:37	
SALES DATA		NET DEPOSIT	\$0.00
NET SALES	\$0.00		
Sales tax	\$0.00		
discount	\$0.00		
SERVICE	\$0.00		
GROSS SALES	\$0.00		
0 NO SALE			
0 CUSTOMER			
0 TRANSFER			



What should you do if your EOD has not been done?



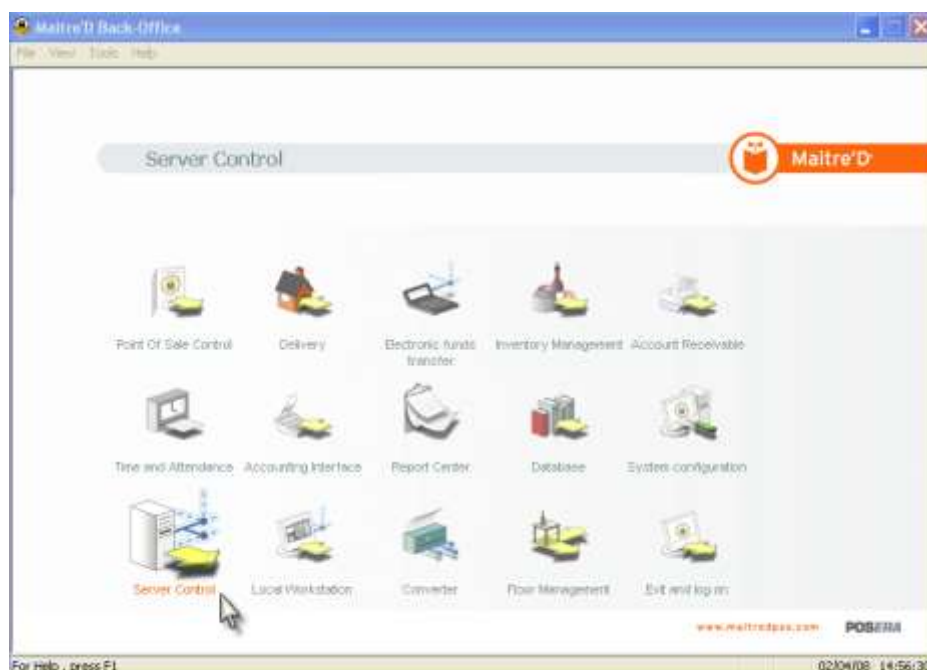
FINANCIAL REPORT
RESTAURANT SUMMARY

SALES DATA	
NET SALES	£1937.24
Sales tax	£0.00
Inclusive tax	£339.01
discount	£0.00
SERVICE	£0.00
GROSS SALES	£2276.25

Last Closing Date : 01-14-2008

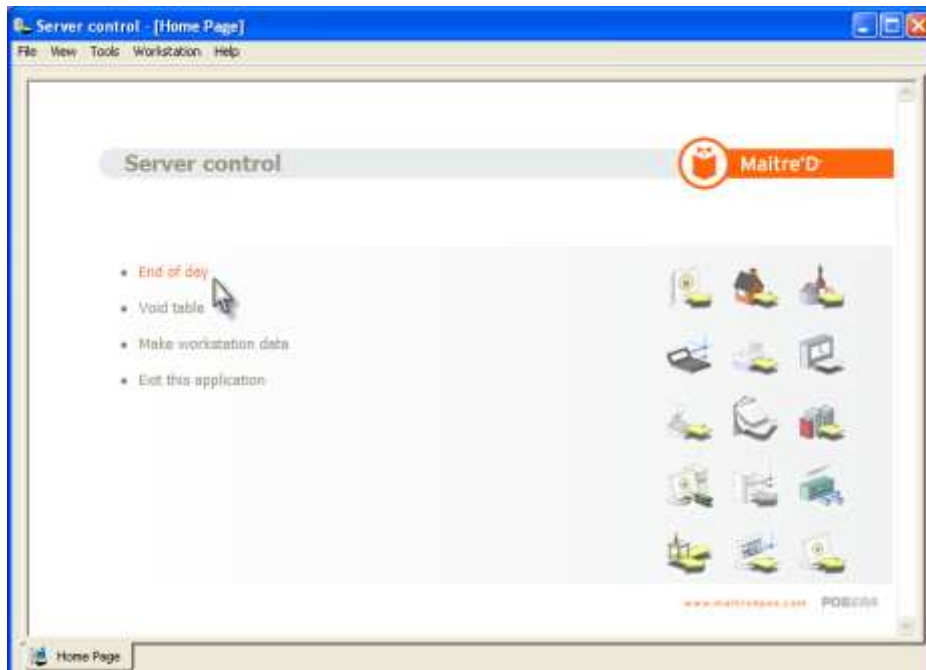


In the Maitre'D back office click on **Server Control**

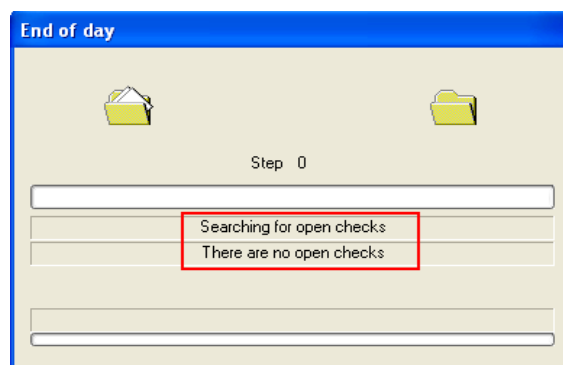




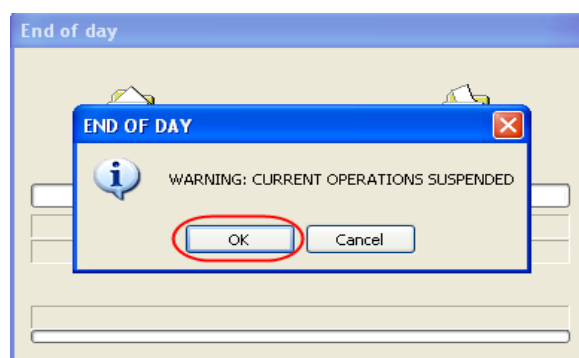
Click on **END OF DAY**



The system will start by checking if there are any tables left open or sales waiting to be cashed out.

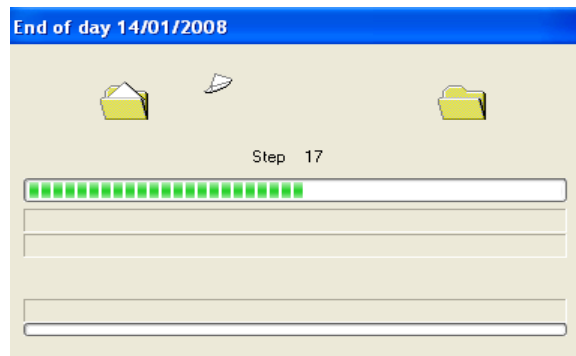


If there are no tables or checks open, you will see the following window. Click on **OK** to start the EOD





The window below shows what happens during the EOD
It normally takes approximately 2 to 3 minutes.
You cannot perform any sales or use the POS whilst the EOD is in progress.



If you have tables left open, the system will warn you and will display the tables or checks as shown in the example below.
You must close all the open tables and all the open checks before you can proceed with the EOD.



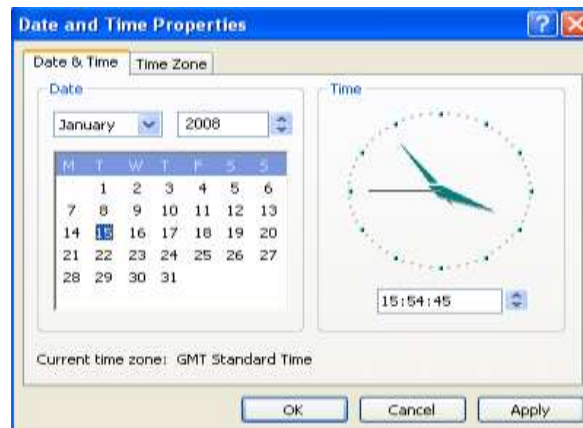
After closing the open tables and open checks you will then be able to proceed with the EOD following the steps above.



What happens if the EOD is not done

Your **Maitre'D** system will continue to function as normal **BUT** your sales totals will keep on running under the current accounting day.
REMEMBER, the accounting day in Maitre'D runs from the time of the last EOD performed on the system.
If your system is set up to do an automatic EOD at 05:00 every morning then your accounting day runs over 2 calendar days.

Let's take a look at the following example on the next page →



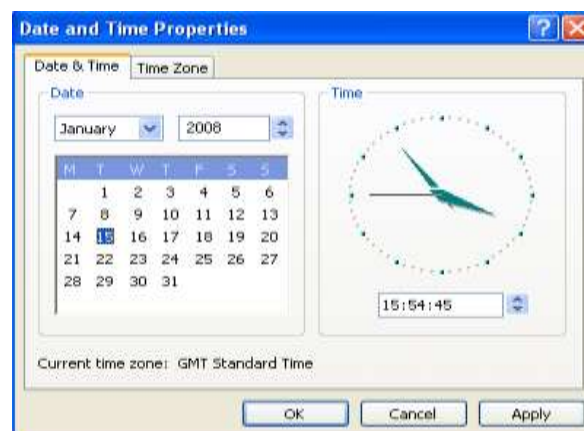
Today's date

Last Closing Date : 01-14-2008

The last closing date in Maitre'D

Maitre'D is up to date – the next EOD will close the accounting day of the 15th – this will normally take place early morning on the 16th

If you do not check the EOD is up to date you could end up with 2 or more calendar days in one accounting day. See below



Today's date

Last Closing Date : 01-13-2008

The last closing date in Maitre'D



If you do not perform an EOD, the sales from the 15th will also be part of the accounting day of the 14th (the 14th being the current accounting day in the example above.)

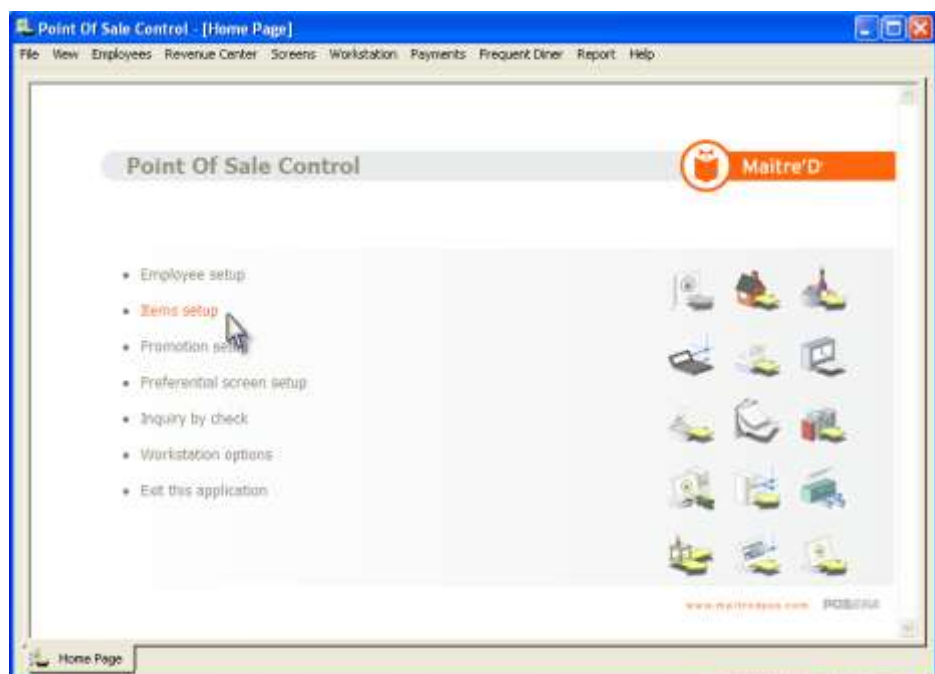
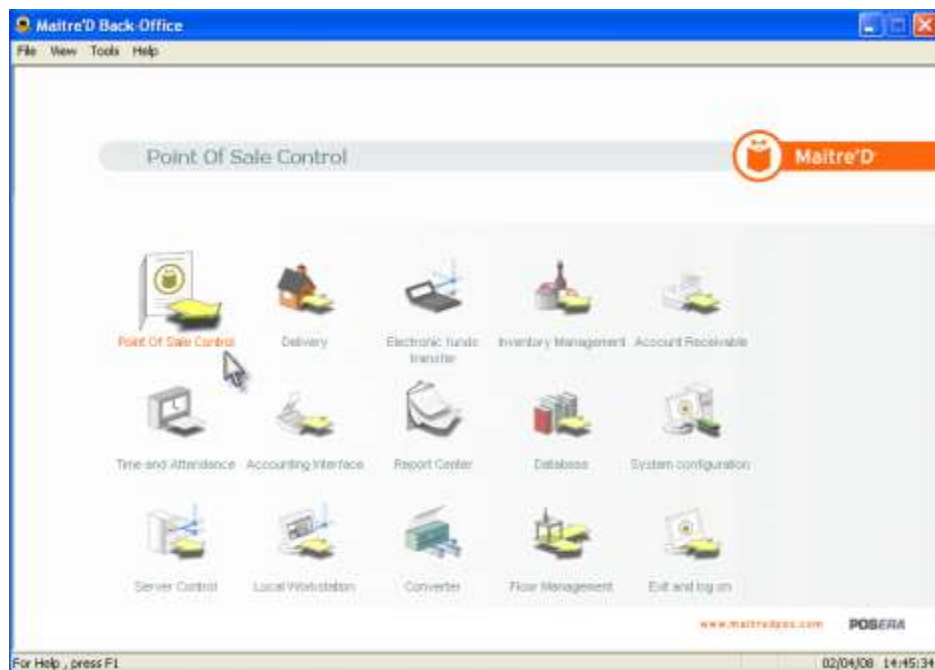
In this case it will not be possible to separate the sales for the 14th and 15th. Your reports will show the sales for Monday and Tuesday combined on the accounting date of the 14th.

REMEMBER to always check your EOD is up to date !!!



Modifying item prices

From the back office select **Point of Sale Control** and click on **Item Set up**





The sales items are displayed in the following window

Search: [] Group by: Items Filter: All Revenue Centers, All Divisions, All Functions

Your sales items are listed alphabetically - usually the modifier items will be listed first as in the example here

Item	PLU	Division	Function	Id
Alfredo Sauce		Modifiers	Modifier	008218
Anchovies		Pz Toppings	Modifier	008328
Bacon		Pz Toppings	Modifier	008323
Baked Potato		Modifiers	Modifier	008355
Blue Cheese		Modifiers	Modifier	008342
Caesar Salad		Modifiers	Modifier	008351
Cheese		Side Orders	Revenue	008045
Chef's Salad		Modifiers	Modifier	008350
Cold		Modifiers	Modifier	008357
Cream		Modifiers	Modifier	008358
French		Modifiers	Modifier	008343
Fries		Modifiers	Modifier	008353
Hot		Modifiers	Modifier	008356
Ice Cream		Desserts	Price rolled up	008086
Italian		Modifiers	Modifier	008344
MyRare		Modifiers	Modifier	008346
MyWell		Modifiers	Modifier	008348
Meat Sauce		Modifiers	Modifier	008341
Medium		Modifiers	Modifier	008347
Mushroom		Pz Toppings	Modifier	008326
No Chilies		Modifiers	Modifier	008363
No Cream		Modifiers	Modifier	008362
No Fries		Modifiers	Modifier	008365
No Garnish		Modifiers	Modifier	008361
No Salad		Modifiers	Modifier	008364
Onion		Pz Toppings	Modifier	008327
Peppers		Pz Toppings	Modifier	008325
Rare		Modifiers	Modifier	008345
Rice		Modifiers	Modifier	008352

There are different ways to search for an item.

First you can type the beginning of the word in the Search text box – the system will display all items containing the sequence of letters you have typed.

Search: Bu Group by: Items Filter: All Revenue Centers, All Divisions, All Functions

Item	PLU	Division	Function	Id
Budweiser		Btl Beers	Revenue	008241
Burger Meal		Combos	Revenue	008369
Cheeseburger		Light Lunches	Revenue	008009
Cheeseburger Meal		Combos	Revenue	008370
Dbl Burger		Light Lunches	Revenue	008016
Hamburger		Light Lunches	Revenue	008013

Type one or more letters and eventually the item you are looking for will display in the window.

Search: Bud Group by: Items Filter: All Revenue Centers, All Divisions, All Functions

Item	PLU	Division	Function	Id
Budweiser		Btl Beers	Revenue	008241



**You can also use the Group by option – by default it is set to Items but can be changed to either Divisions or Functions.
When selecting Divisions the following window will display**

Search:

Group by: Divisions

Filter: All Revenue Centers, All Divisions, All Functions

Division	Item	PLU	Function	Id
+ Starters				
+ Light Lunches				
+ Sandwiches				
+ Pasta				
+ Pizza				
+ Grill				
+ Side Orders				
+ Modifiers				
+ Desserts				
+ Hot Beverages				
+ Pz Toppings				
+ Draught Beer				
+ Btl Beers				
+ Fine Wines				
+ House Wines				
+ Cocktails				
+ Soft Drinks				
+ Specials				
+ Spirits				
+ Combos				
- Reserved				

**Click on the + of the division the product you are searching for belongs to.
It will display all the items which are part of that division.**

Search:

Group by: Divisions

Filter: All Revenue Centers, All Divisions, All Functions

Division	Item	PLU	Function	Id
+ Starters				
+ Light Lunches				
+ Sandwiches				
+ Pasta				
+ Pizza				
+ Grill				
+ Side Orders				
+ Modifiers				
+ Desserts				
+ Hot Beverages				
+ Pz Toppings				
+ Draught Beer				
- Btl Beers				
+ Budweiser		Btl Beers	Revenue	008241
+ Corona		Btl Beers	Revenue	008240
+ Miller Lite		Btl Beers	Revenue	008242
+ Fine Wines				
+ House Wines				
+ Cocktails				
+ Soft Drinks				
+ Specials				
+ Spirits				
+ Combos				
- Reserved				



When selecting Functions the following window will display

Search:

Group by:

Filter:

Function	Item	PLU	Division	Id
+ Revenue				
+ Free				
+ Modifier				
+ Free on check				
+ Scale				
+ Price rolled up				
+ Time				
+ Point				

Click on the + of the item function you are searching for – in this case Revenue. All the sales items associated to that Function will display. You can use the scroll bar to move up and down.



NB: The functions will be explained in more details in the next chapter.

Search:

Group by:

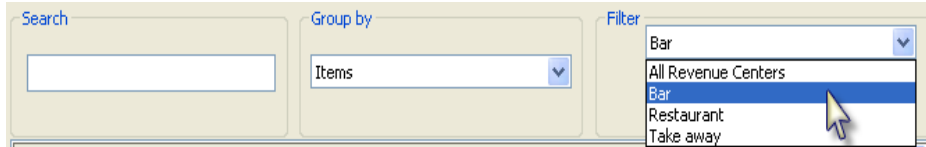
Filter:

Function	Item	PLU	Division	Id
- Revenue				
+ ==> Cheese		Side Orders	Revenue	008045
+ 1/2 Pint Miller		Draught Beer	Revenue	008338
+ 12 OZ Rib Steak		Grill	Revenue	008163
+ 14OZ Rib Steak		Grill	Revenue	008168
+ 250ml Gls Red		House Wines	Revenue	008234
+ 250ml Gls White		House Wines	Revenue	008235
+ 35cl D/Coke		Soft Drinks	Revenue	008223
+ 35cl Fanta		Soft Drinks	Revenue	008230
+ 35ml Coke		Soft Drinks	Revenue	008060
+ 35ml Sprite		Soft Drinks	Revenue	008227
+ 50cl Coke		Soft Drinks	Revenue	008221
+ 50cl D/Coke		Soft Drinks	Revenue	008224
+ 50cl Sprite		Soft Drinks	Revenue	008231
+ 75cl Coke		Soft Drinks	Revenue	008222
+ 75cl D/Coke		Soft Drinks	Revenue	008225
+ 75cl Fanta		Soft Drinks	Revenue	008232
+ 75cl Sprite		Soft Drinks	Revenue	008229
+ Apple Pie		Desserts	Revenue	008079
+ Beaujolais Villages	1	Fine Wines	Revenue	008313
+ Bloody Mary		Cocktails	Revenue	008243
+ Bordeaux Rouge		Fine Wines	Revenue	008311
+ Budweiser		Btl Beers	Revenue	008241
+ Burger Meal		Combos	Revenue	008369
+ Cappuccino		Hot Beverages	Revenue	008047
+ Chablis	2	Fine Wines	Revenue	008316
+ Chardonnay		Fine Wines	Revenue	008318
+ Cheeseburger		Light Lunches	Revenue	008009



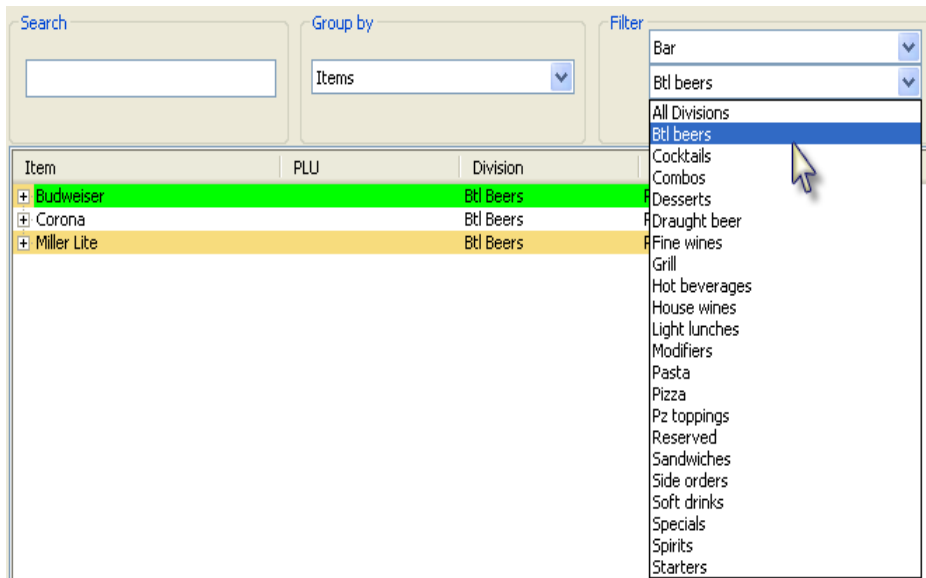
You can also use the filter options. If you have more than one revenue center set up you will be able to choose from the drop down list. It will only display items associated with this particular revenue center. The default option is set to All Revenue Centers.

 **Revenue Center:** a revenue center is an area where sales are generated and is set up by your **Maitre'D** consultant from the information supplied.



Search: [] Group by: Items Filter: Bar, All Revenue Centers, Bar, Restaurant, Take away

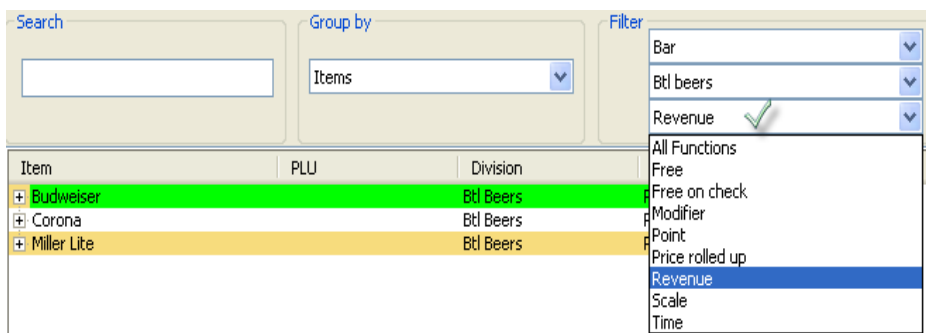
You can filter by divisions.
The default option is set to All Divisions



Search: [] Group by: Items Filter: Bar, Btl beers, All Divisions, Btl beers, Cocktails, Combos, Desserts, Draught beer, Fine wines, Grill, Hot beverages, House wines, Light lunches, Modifiers, Pasta, Pizza, Pz toppings, Reserved, Sandwiches, Side orders, Soft drinks, Specials, Spirits, Starters

Item	PLU	Division
+ Budweiser		Btl Beers
+ Corona		Btl Beers
+ Miller Lite		Btl Beers

You can also filter by Functions.
The default option is Revenue



Search: [] Group by: Items Filter: Bar, Btl beers, Revenue, All Functions, Free, Free on check, Modifier, Point, Price rolled up, Revenue, Scale, Time

Item	PLU	Division
+ Budweiser		Btl Beers
+ Corona		Btl Beers
+ Miller Lite		Btl Beers



Double click on the item you want to modify-the following window will display.
The text box - Regular - displays the item description as printed on guest's checks and back office reports.
To modify prices select Configuration

Item #8241 (7938) - Budweiser

Item

Description

Regular Budweiser

Alternate

OK Cancel Apply

The window displayed will show the prices of the item for all revenue centers and modes where applicable. In this example, the item is sold both in the Bar and Restaurant revenue centers across 3 different modes.

 **Modes:** Modes define time periods for reporting and pricing purposes – such as Lunch, Happy Hour and Dinner.

Item #8241 (7938) - Budweiser

Configuration

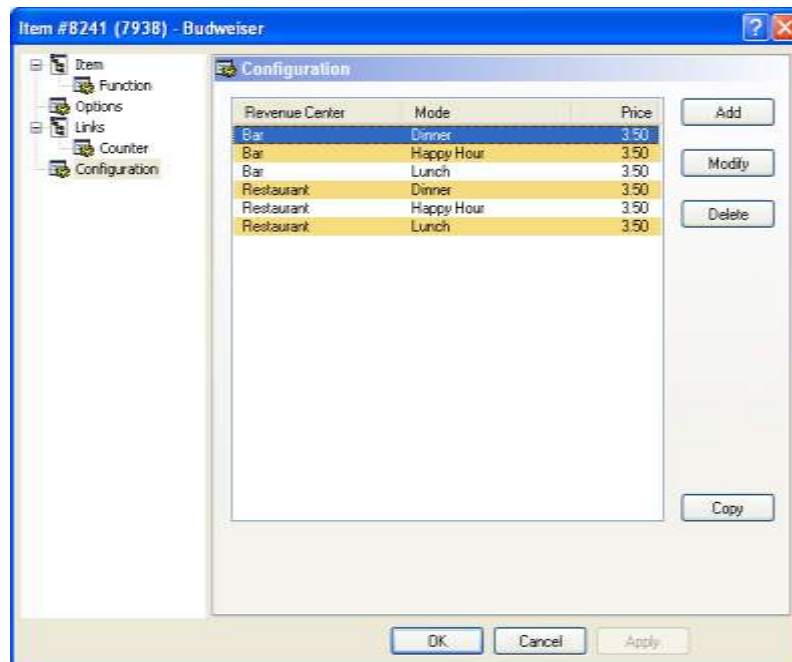
Revenue Center	Mode	Price
Bar	Happy Hour	3.50
Bar	Lunch	3.50
Bar	Dinner	3.50
Restaurant	Happy Hour	3.50
Restaurant	Lunch	3.50
Restaurant	Dinner	3.50

Add Modify Create Copy

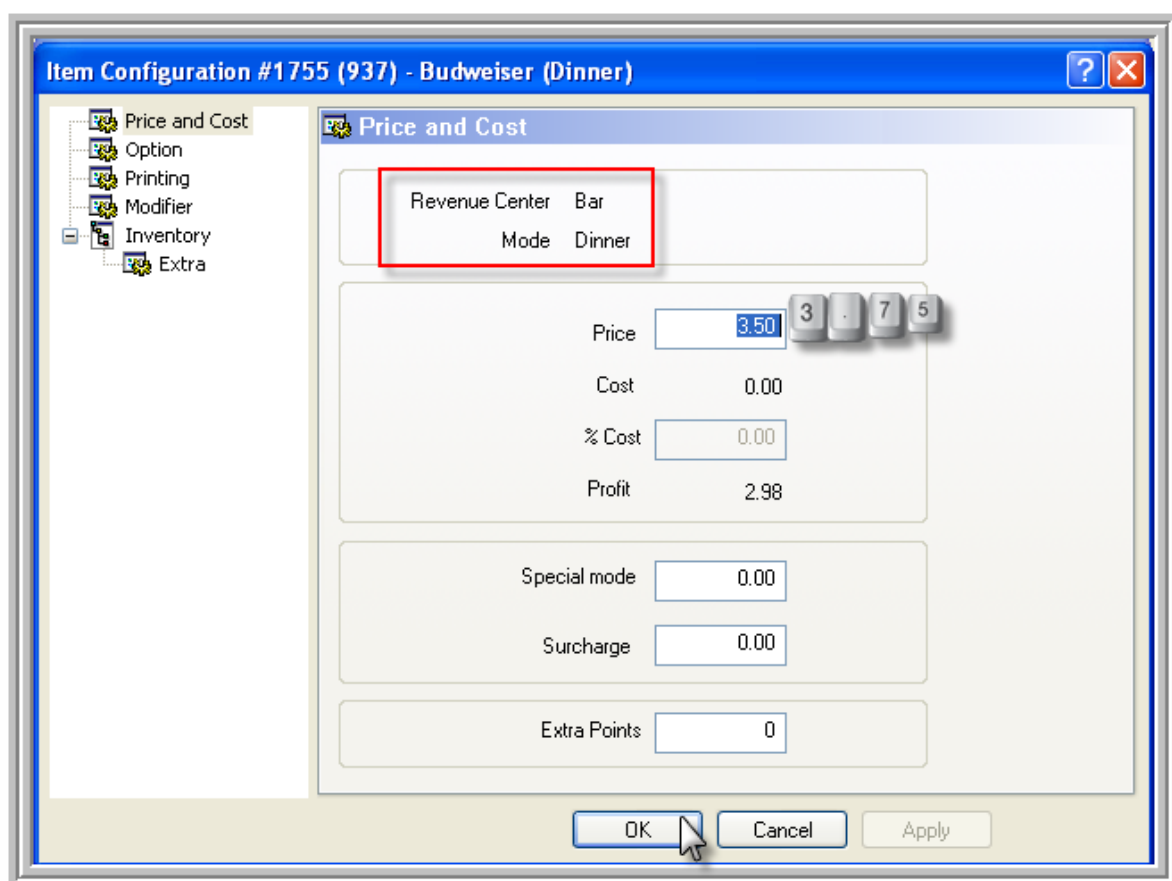
OK Cancel Apply

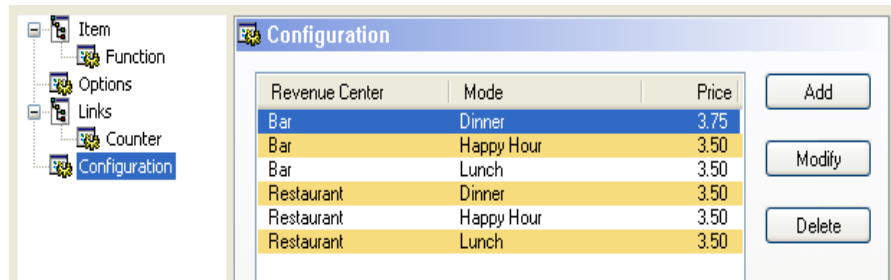


Double click a revenue center and mode line, or click once and click on Modify

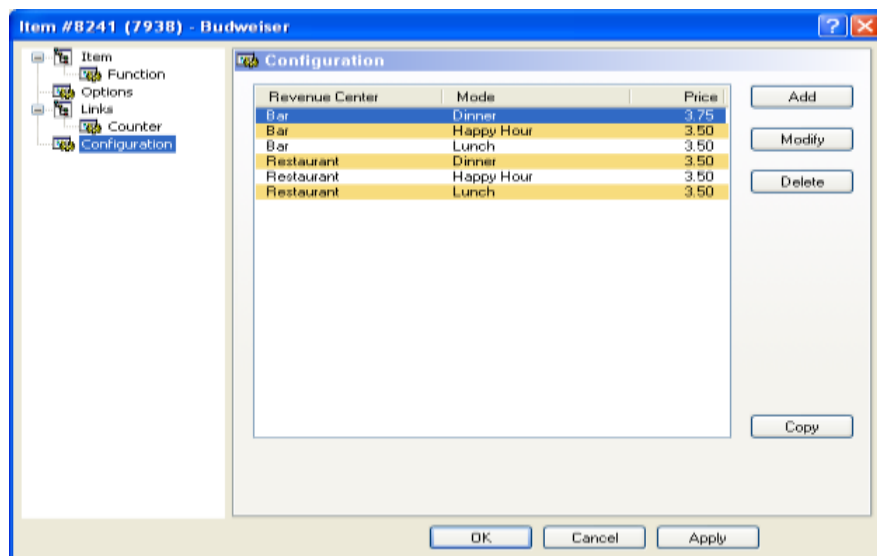


Highlight the price, type in the new price and click OK

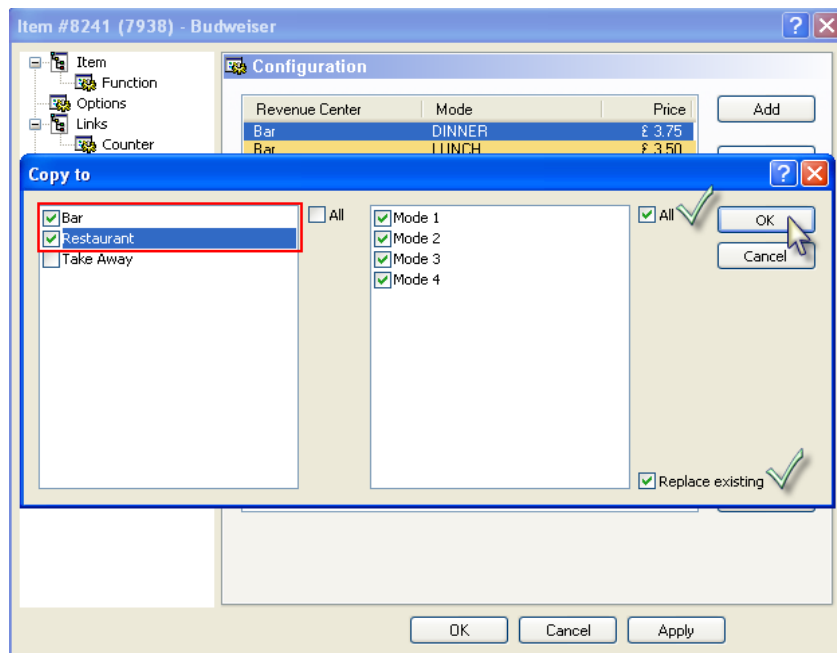




You may need to modify the rest of the prices for the other modes and revenue centers. Click on Copy



Select the appropriate revenue centers and modes and don't forget to check Replace existing – otherwise the prices would not be modified. Click OK



Click on OK to confirm and Exit





As an alternative, prices can be changed line by line. This might be useful if you are modifying one price only and as a result do not need to copy to the other revenue centers and modes.

Select the item and click on the **+** to display all prices and select appropriate mode form the list – you can double click or highlight and click on Modify

Item	PLU	Division	Function	Id
BUDWEISER		Btl Beers	Revenue	008241
Restaurant	Dinner	3.75		001756
Bar	Dinner	3.75		001755
Bar	Lunch	3.75		001754
Bar	Happy Hour	3.75		001753
Restaurant	Lunch	3.75		001752
Restaurant	Happy Hour	3.75		001751
CORONA		Btl Beers	Revenue	008240
MILLER LT		Btl Beers	Revenue	008242

Highlight the price, type in the new price and click OK

Item Configuration #1753 (936) - Budweiser (Happy hour)

Price and Cost

Revenue Center: Bar
Mode: Happy Hour

Price: 3.75
Cost: 0.00
% Cost: 0.00
Profit: 3.19

Special mode: 0.00
Surcharge: 0.00
Extra Points: 0

OK Cancel Apply



Click on Close to exit

Sales Items

Search:

Group by:

Filter:

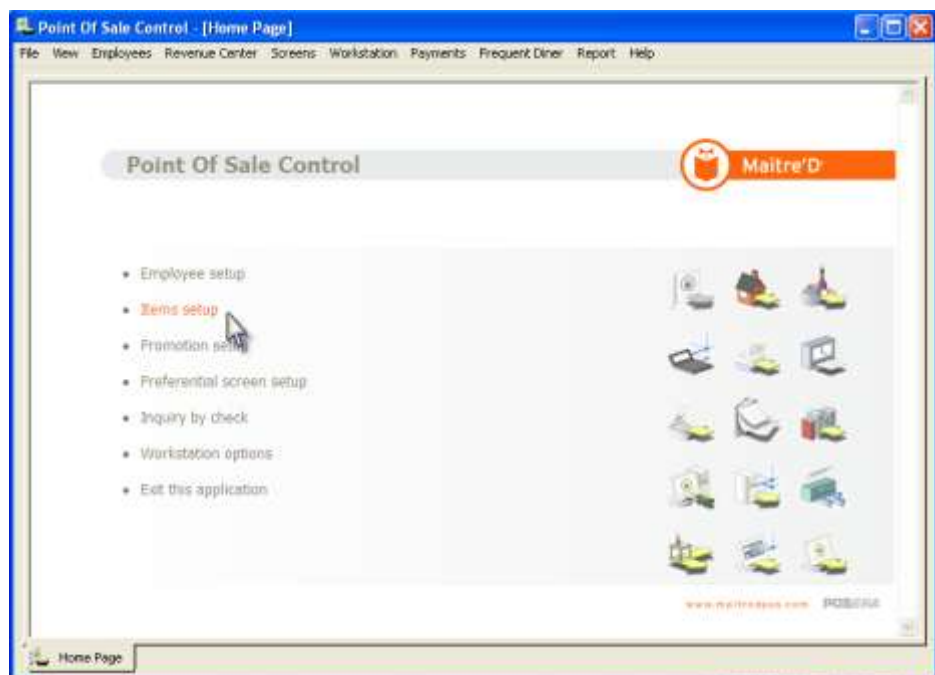
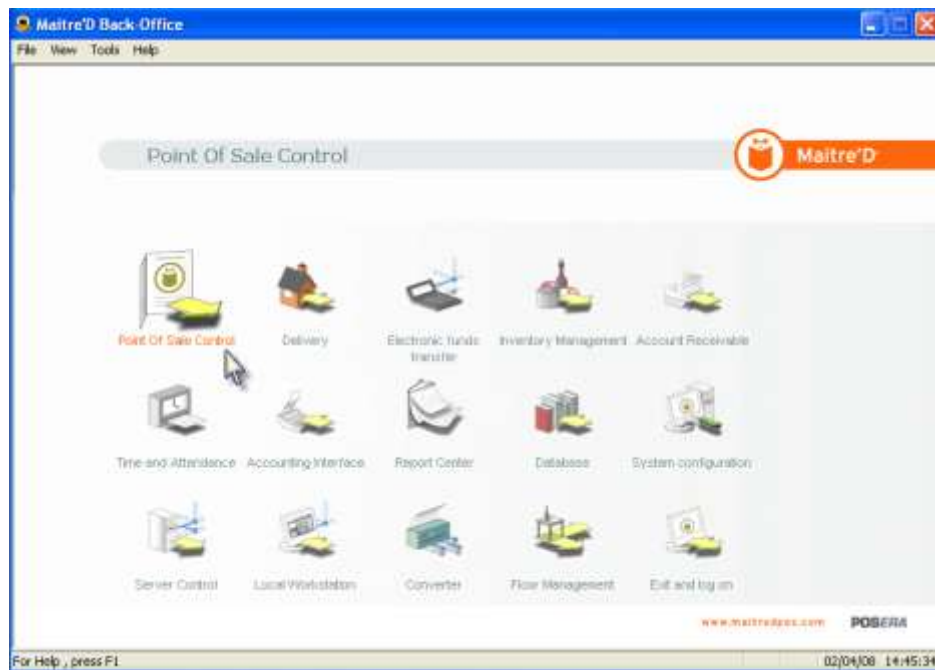
Item	PLU	Division	Function	Id
BUDWEISER		Btl Beers	Revenue	008241
Restaurant	Dinner	3.75		001756
Bar	Dinner	3.75		001755
Bar	Lunch	3.75		001754
Bar	Happy Hour	3.75		001753
Restaurant	Lunch	3.75		001752
Restaurant	Happy Hour	3.00		001751
CORONA		Btl Beers	Revenue	008240
MILLER LT		Btl Beers	Revenue	008242

Buttons: Modify, Add, Remove, Duplicate, Close

Creating new items



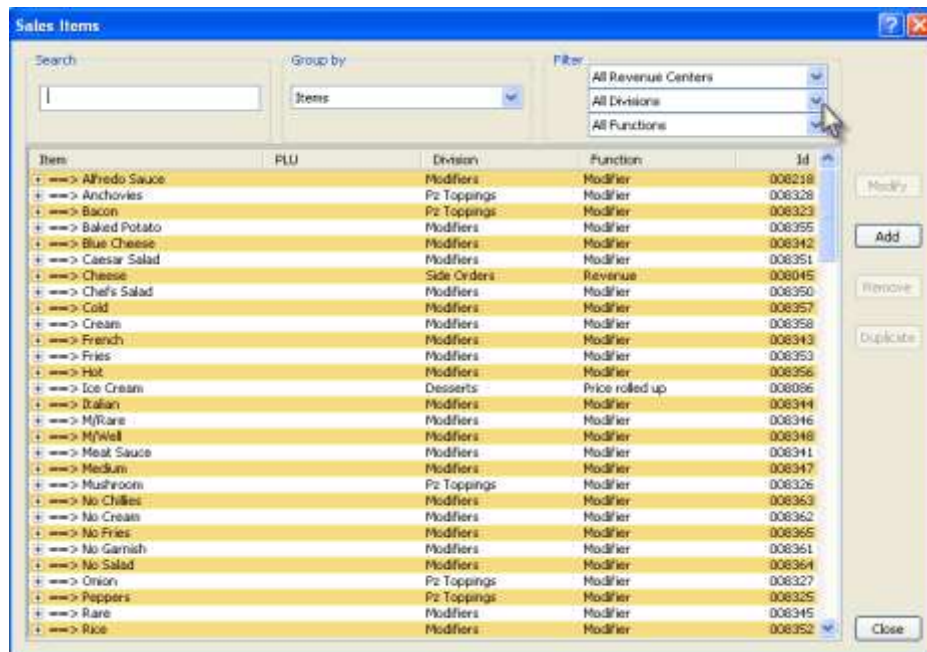
From the back office select **Point of Sale Control** and click on **Item Set up**



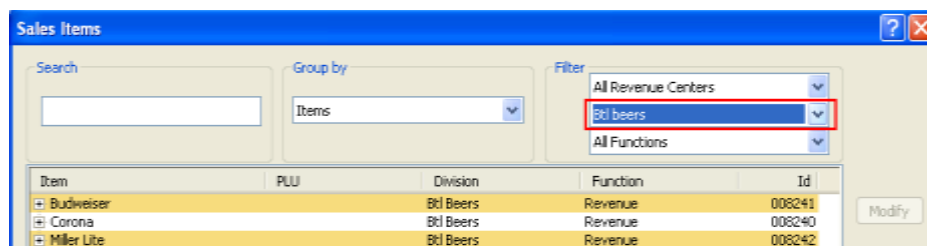


As explained in the previous chapter, the window will display all the sales items.

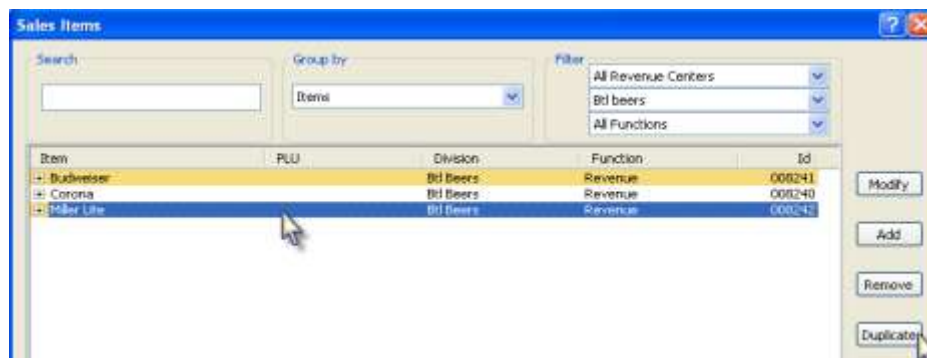
The easiest way to add sales items is to duplicate an existing one.



For example if you wanted to add a new bottle of beer just filter on the appropriate division → Btl beers

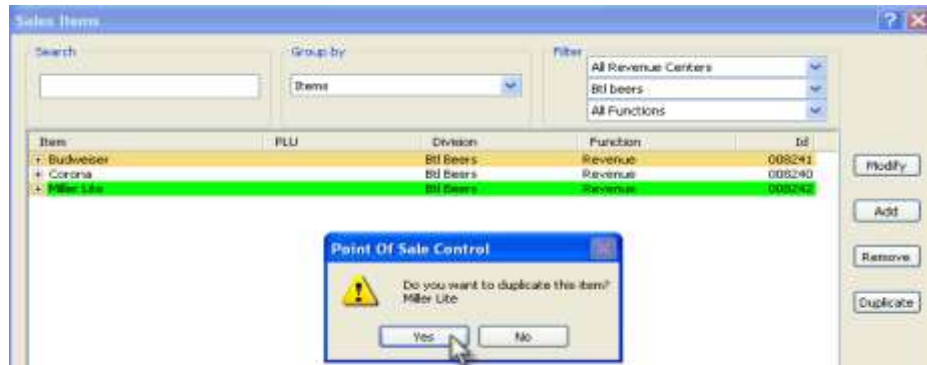


Select one item and click on Duplicate

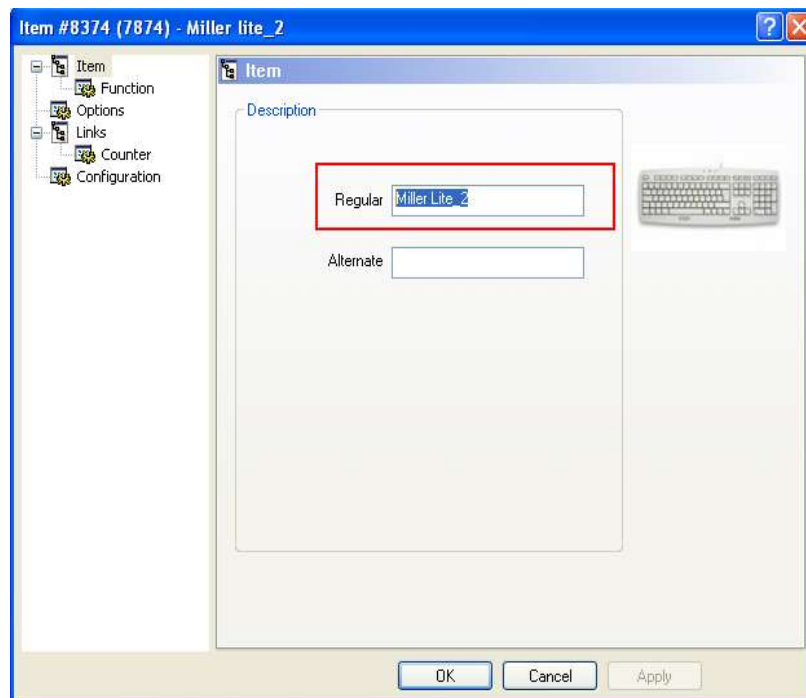




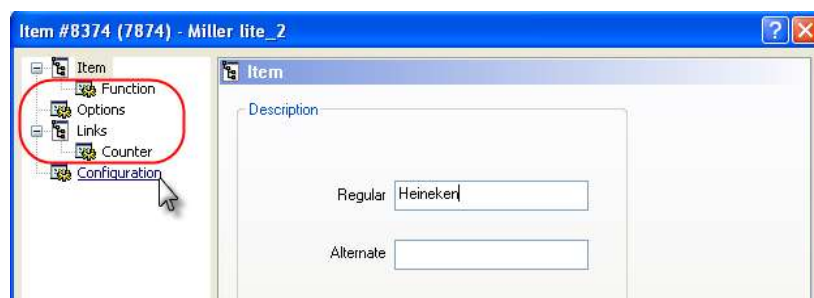
Click on Yes in the prompt box



**Highlight the current description and type the new description.
Alternate is used only if you want to print a different or abbreviated description
on kitchen / bar printer checks.**

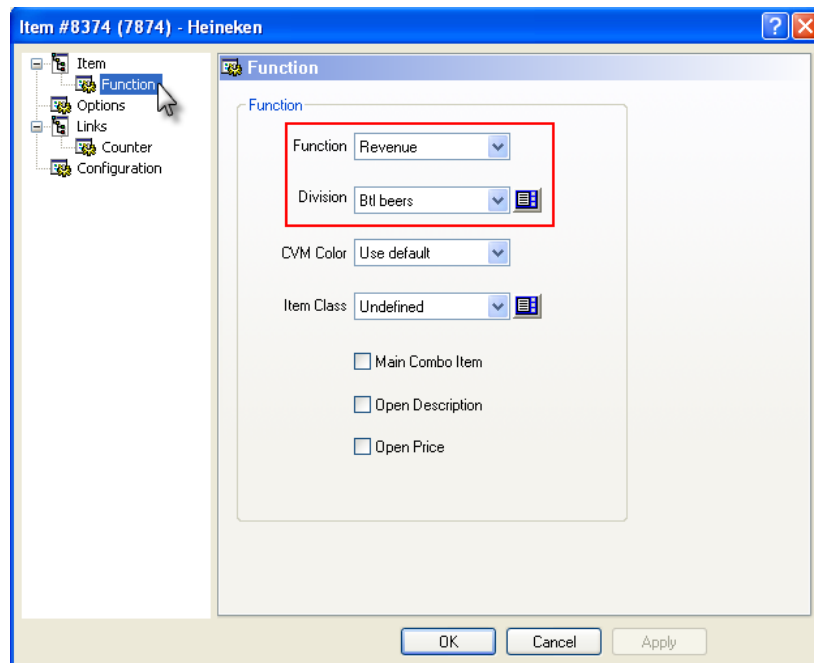


**By duplicating you can go straight to Configuration and input prices.
The Function, Options, Links and Counter will not need configured as you have
duplicated from a similar existing item.**





However, it is important to understand how these tabs are configured.
Click on Function



Sales items can have different functions. In the above example it is set to Revenue. The items functions are explained below.

Revenue:

Sales items which generates cash sales.

Modifiers:

The most common modifier items describe how a customer wants an item cooked such as a rare or medium rare or to specify an accompanying vegetable or dressing.

Price Rolled Up:

Use to set an item as a priced modifier. On the guest check the price of this item is automatically included in the price of the main item.

Free:

Sales item with no price. This item is not printed on the guest check. Example: Glass and Jug of Water.

Free on Check:

Same as a Free item but printed on the guest check.

Point, Scale and Time:

Those are specific functions only used for certain types of operations. Point is for the Frequent Diner module. Scale and Time are very seldom used and only within specific setups.



The Division option groups sales items on back office reports. By duplicating a similar item the new sales item will report to the correct division. The divisions will be explained in more details in the next chapter.

!! So remember, always duplicate a similar sales item to ensure revenue is correctly allocated to the appropriate division!!



Click on Options

The screenshot shows the 'Options' dialog box for item #8374 (Heineken). The left sidebar contains a tree view with 'Item', 'Function', 'Options' (selected), 'Links', 'Counter', and 'Configuration'. The main area has two sections: 'Options' and 'Others'. In the 'Options' section, 'In report' and 'Available' are checked, while 'Evaluation sheet' is unchecked. In the 'Others' section, 'Shift/Tare', 'CVM item count', and 'No. meals' are all set to 0. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

In report compiles sales statistics for this item and will include it in the Sales Item Report. Available refers to the item being available for ordering. If the option is not enabled the item is not available for ordering on the POS screen. These options are ALWAYS enabled.

Click on Links

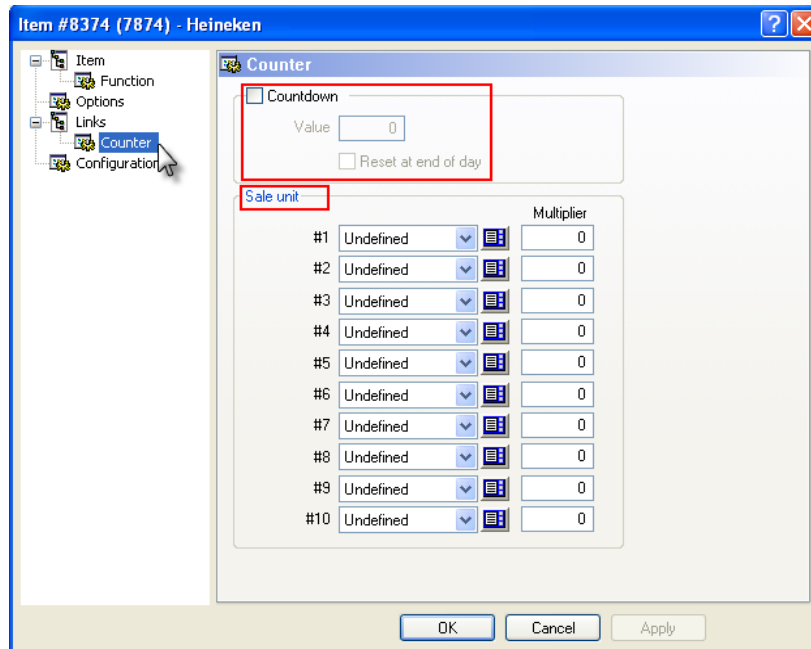
The screenshot shows the 'Links' dialog box for item #8374 (Heineken). The left sidebar is the same as the previous screenshot, with 'Links' now selected. The main area has a 'Links' section with fields for 'Buffer' (Undefined), 'PLU number' (Undefined, highlighted with a red box), 'Bar Code ID', and 'External code' (0). Below this is an 'Upsize' section (highlighted with a red box) containing a table with 10 rows, each with a label (#1 to #10), an 'Undefined' field, and a 'Select' button. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

PLU number can link a sales item to a PLU number for easier ordering at the POS (this can be used for wines ordered by bin# etc...)

Upsize can link items of different sizes (sm coffee and lg coffee etc...)



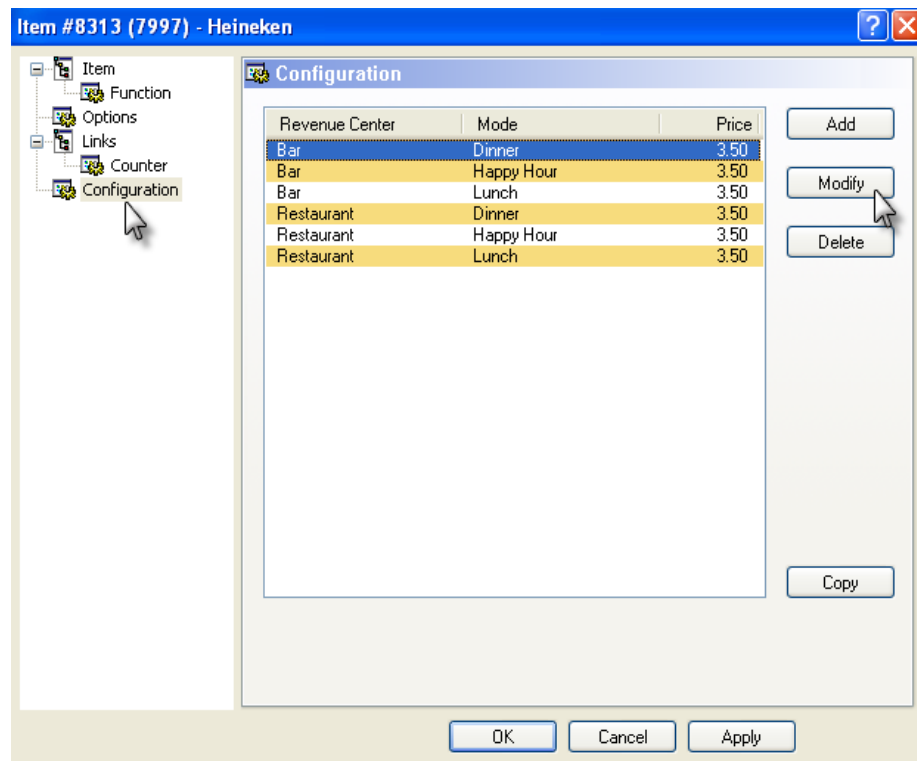
Click on Counter



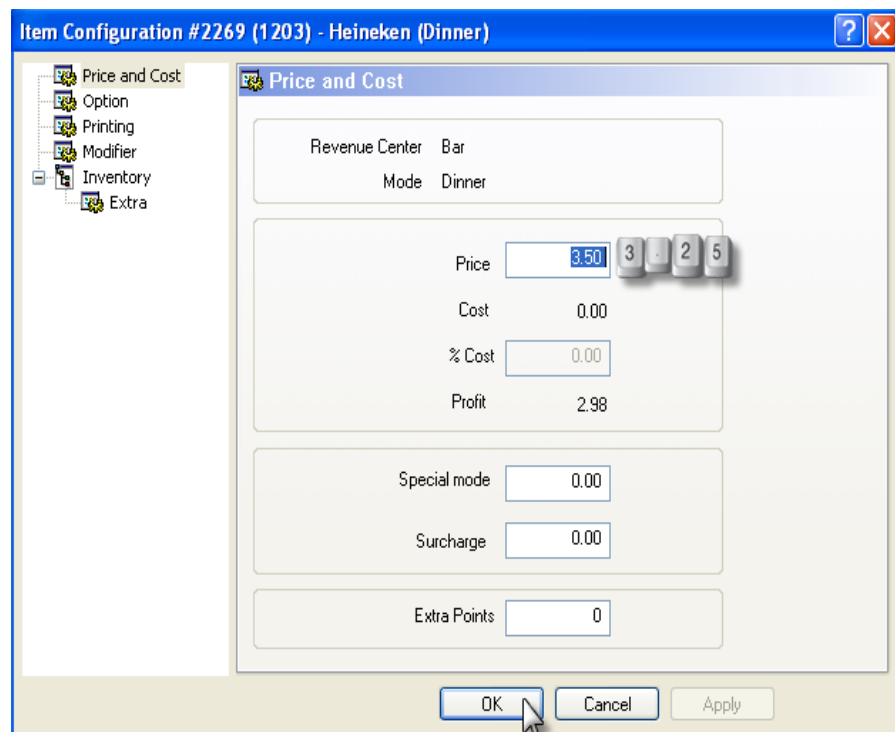
The counter options include Countdown and Sales Unit. These two options enable a countdown meter to appear besides the sales item on the POS screen.

As we have reviewed the other options we can return to Configuration and prices.

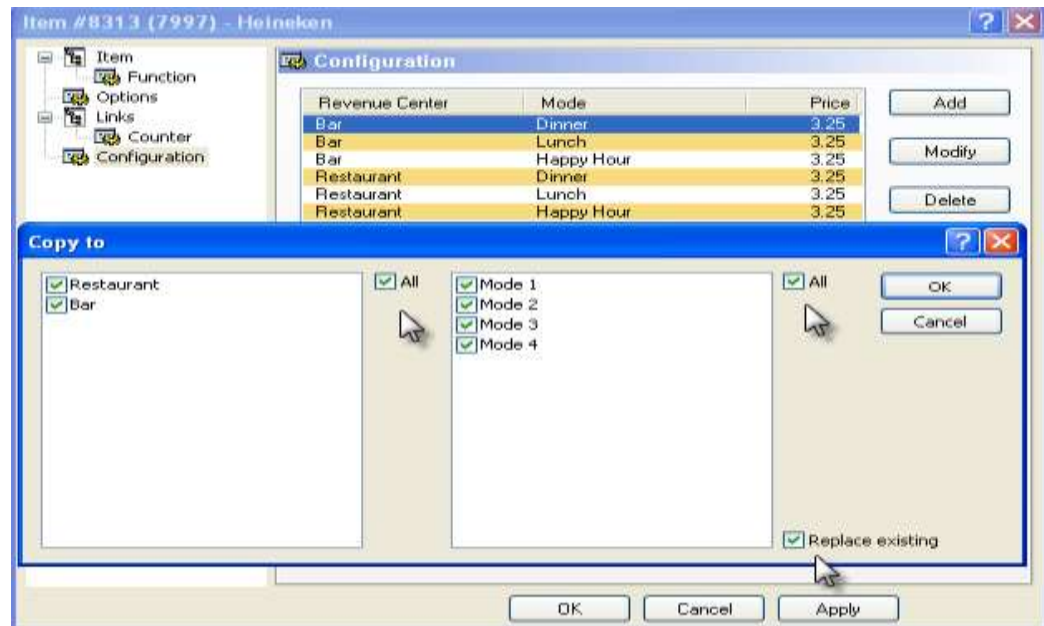
Double click a revenue center and mode line, or click once and click on Modify



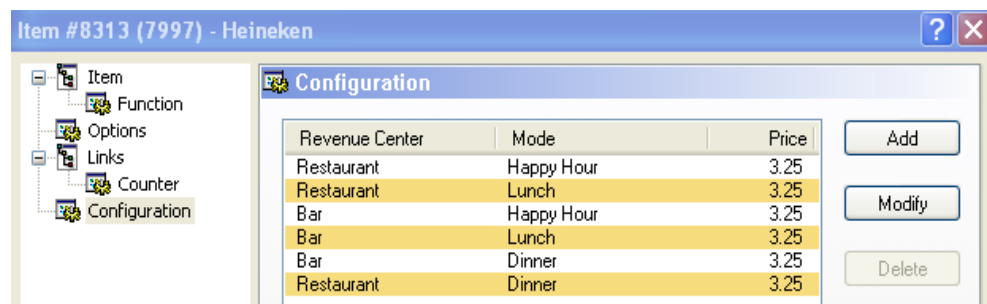
**Highlight the price line and type in the price of the new sales item.
Click on OK**



**Proceed with copying to other revenue centers and modes as seen in
the previous chapter and click on OK**

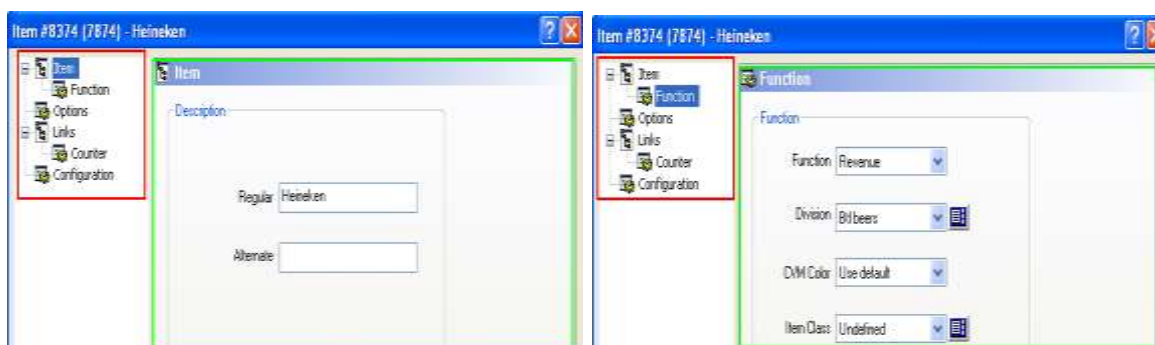


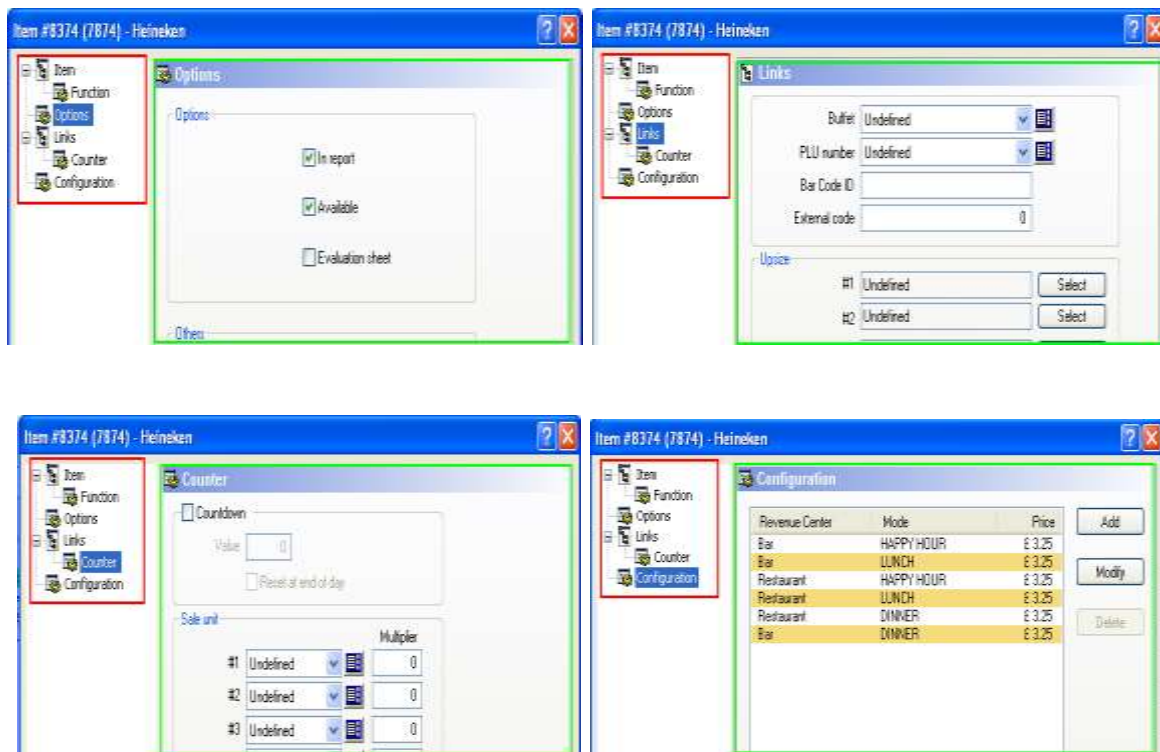
It's done!!



You might have noticed when entering prices that the options on the left hand side of the window are different.

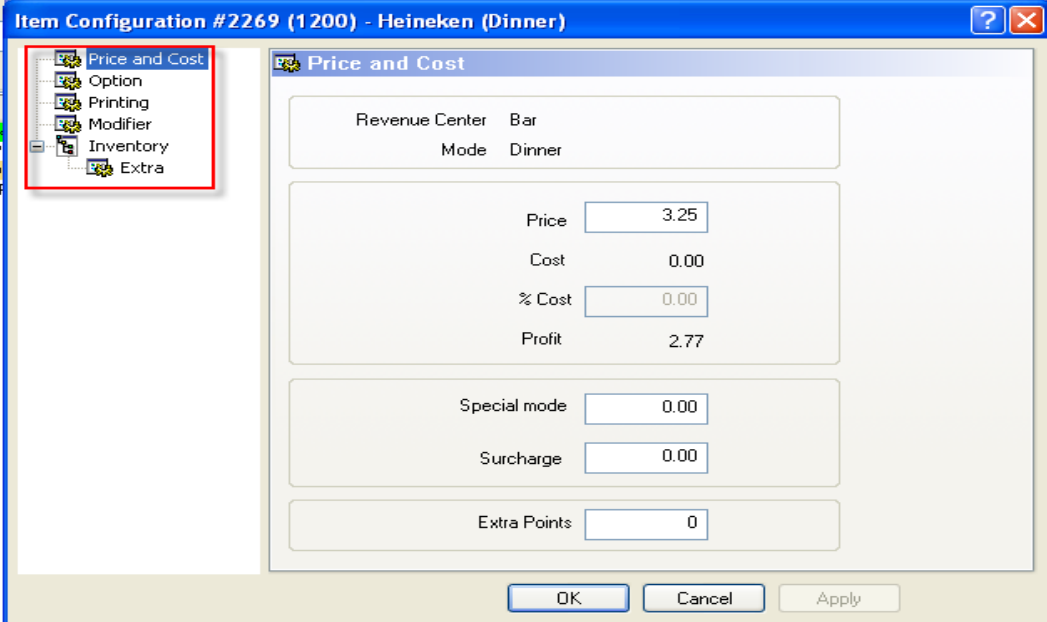
When duplicating or selecting a sales item, the options you see on the left (in the red window) do not change regardless of which option you select – only the window (in green) will change according to which option you have selected on the left. See below:





In the last window – Configuration – selecting any of the lines will bring a new set of options on the left – see next page →

These options contain additional settings for the sales item such as where the item is set to print and whether this item has a modifier.



Item Configuration #2269 (1200) - Heineken (Dinner)

Price and Cost

Revenue Center Bar
Mode Dinner

Price 3.25
Cost 0.00
% Cost 0.00
Profit 2.77

Special mode 0.00
Surcharge 0.00

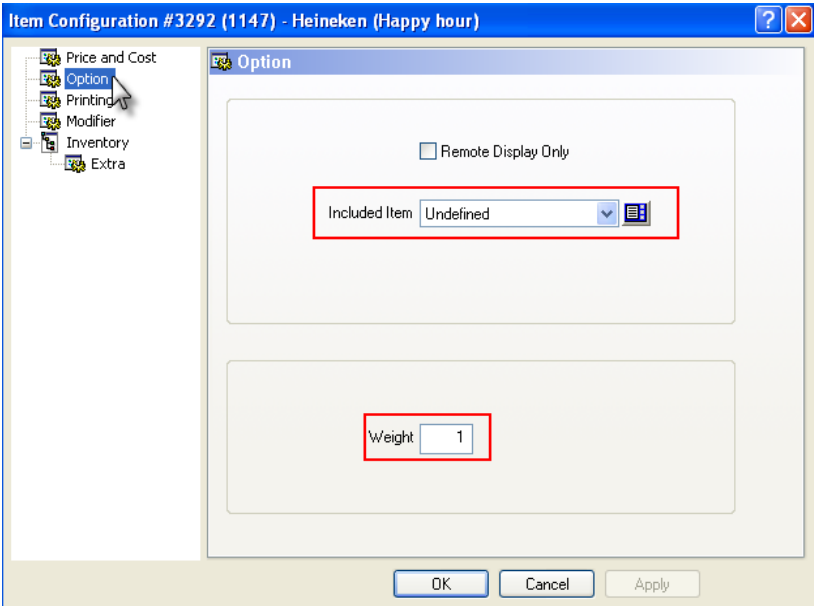
Extra Points 0

OK Cancel Apply

Because the item was duplicated from a similar item, the Option, Printing and Modifier will not in most cases need to be configured. The Inventory option is valid when the Inventory Module has been purchased. Full explanation is available in a separate Inventory set up guide.

Let's briefly explain the role of the other options.

Click on Option



Item Configuration #3292 (1147) - Heineken (Happy hour)

Option

☐ Remote Display Only

Included Item Undefined

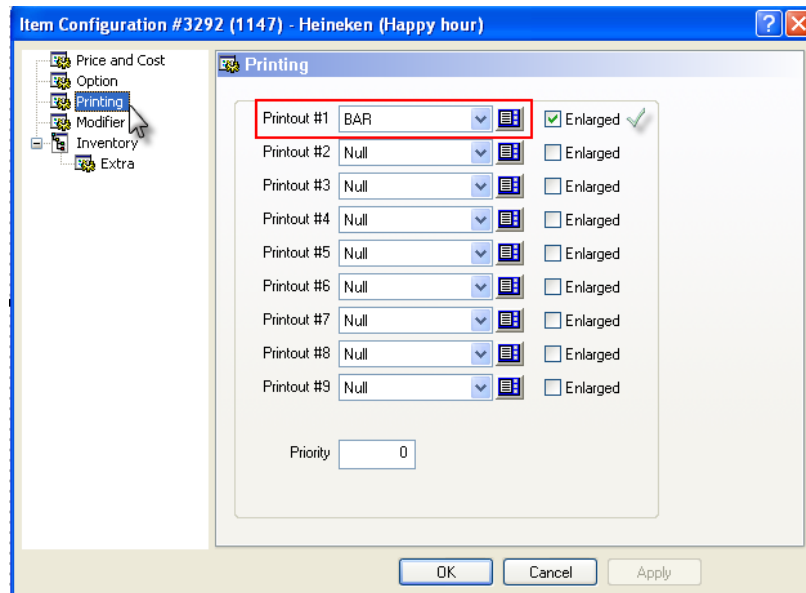
Weight 1

OK Cancel Apply



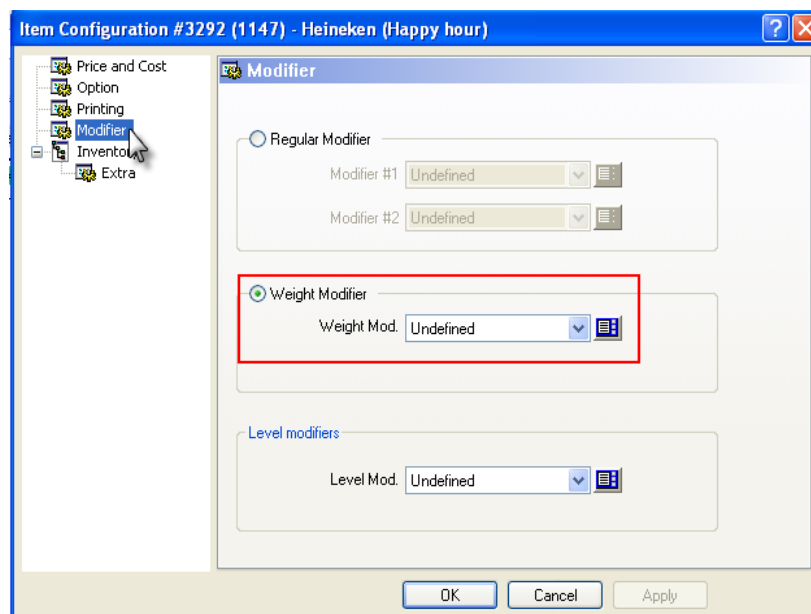
**The Included Item option can be used to include one or more sales items to be ordered with the main sales item.
Weight refers to modifiers. The default value should always be 1.**

Click on Printing



**Printout is the option which allows you to select the remote printer this item should print to.
The Enlarged option will print the sales item in bold characters.**

Click on Modifier



The Weight Modifier option is where to define the link to a weight modifier. The default option is set to Undefined.



**Regular Modifier is rarely used anymore.
This concludes the set up of your new sales item.**

Revenue Center	Mode	Price
Bar	Dinner	3.25
Bar	Lunch	3.25
Bar	Happy Hour	3.25
Restaurant	Dinner	3.25
Restaurant	Lunch	3.25
Restaurant	Happy Hour	3.25

To close the window click on Apply and OK

Item	PLU	Division	Function	Id
Budweiser		Btl Beers	Revenue	008241
Corona		Btl Beers	Revenue	008240
Inland		Btl Beers	Revenue	008374
Miller Lite		Btl Beers	Revenue	008242



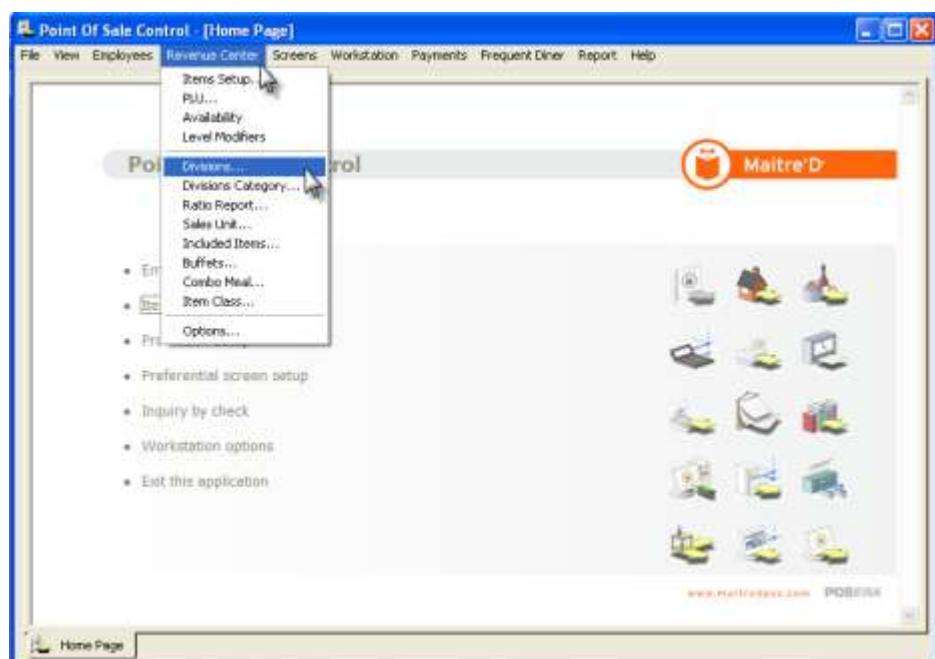
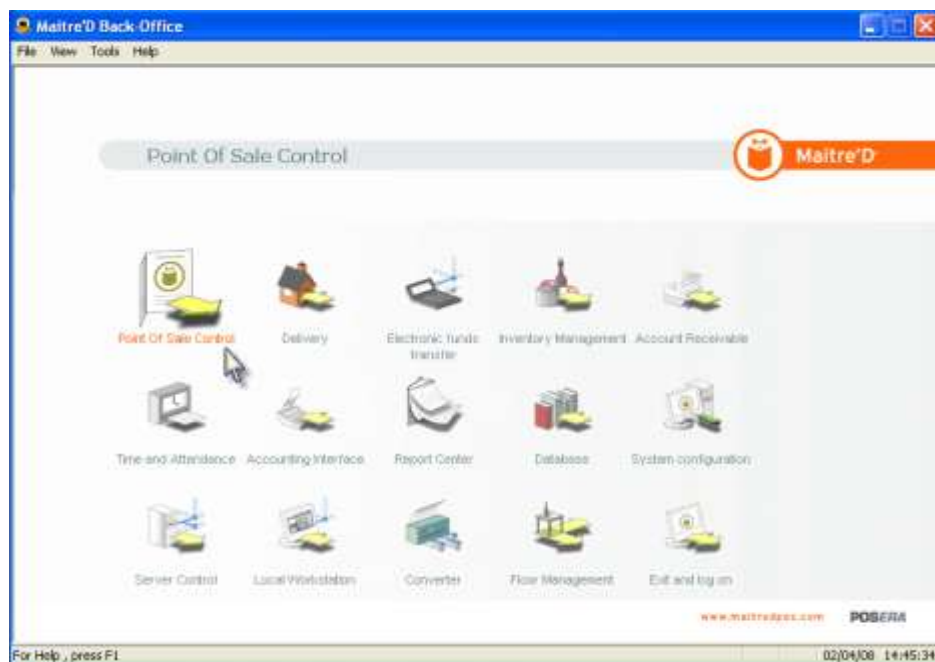
As you have seen creating a new item is straightforward and should be trouble free – providing you have duplicated from the right sales item.



Of course you may need to change or perhaps add a modifier to a new item; this will be fully explained in the chapter dedicated to modifiers.

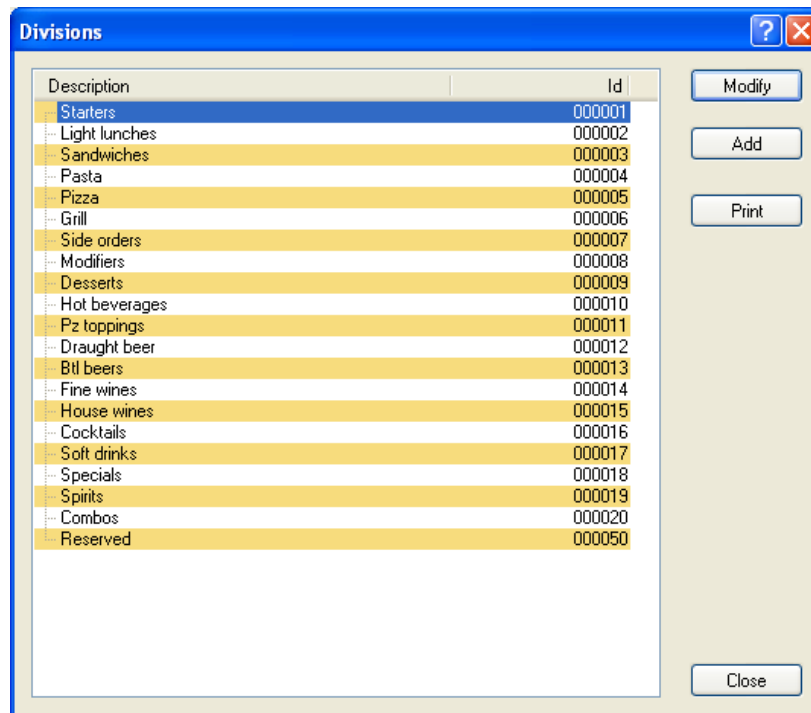
Divisions

From the back office select **Point of Sale Control**
Click on **Revenue Center**
Click on **Divisions**





The following window displays the list of divisions.



What is a Division?

Divisions group items together and usually correspond to main sections of your menu. There is a maximum of 50 divisions available. For example: main courses, desserts and draft beer are common divisions.

In the back office report module, most reports, including the employee reading, sort by division.

Divisions are also where taxes, promotions and other functionalities are programmed.

In addition, each division is associated with one out of 32 possible division categories for broader reporting purpose.

For example, food and drinks are common division categories.



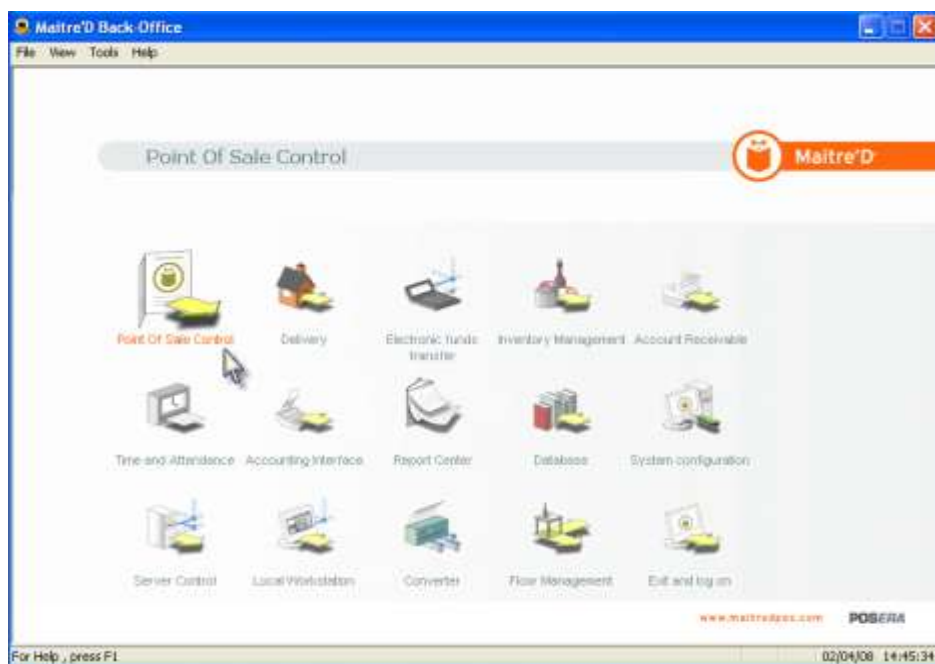
Variable Lists and Item Classes

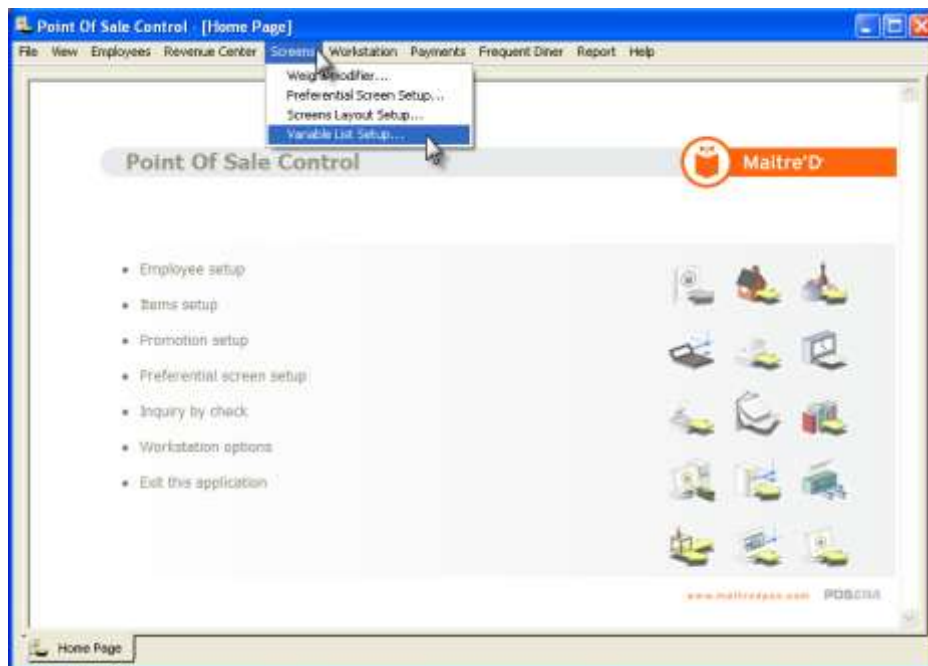
Variable Lists

From the back office select **Point of Sale Control**

Click on **Screens**

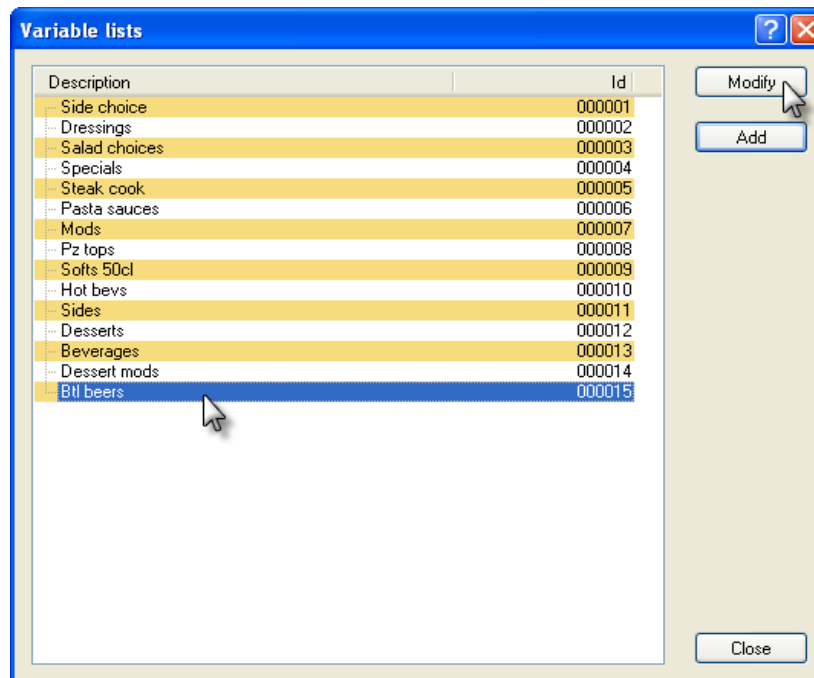
Click on **Variable list setup**



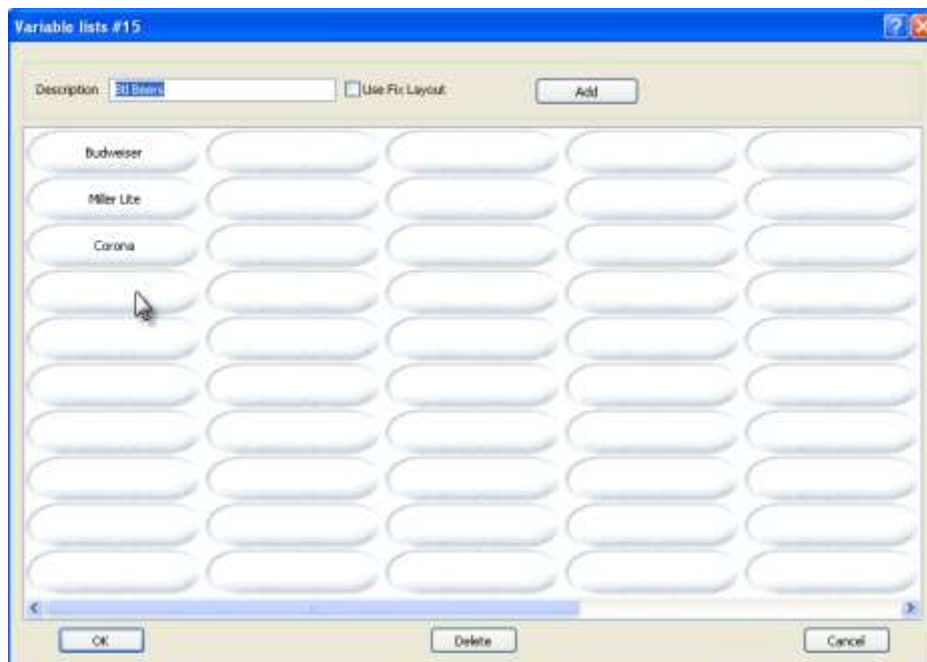


**Variable lists contain sales items which can be ordered from the POS.
The following window displays the variable lists.**

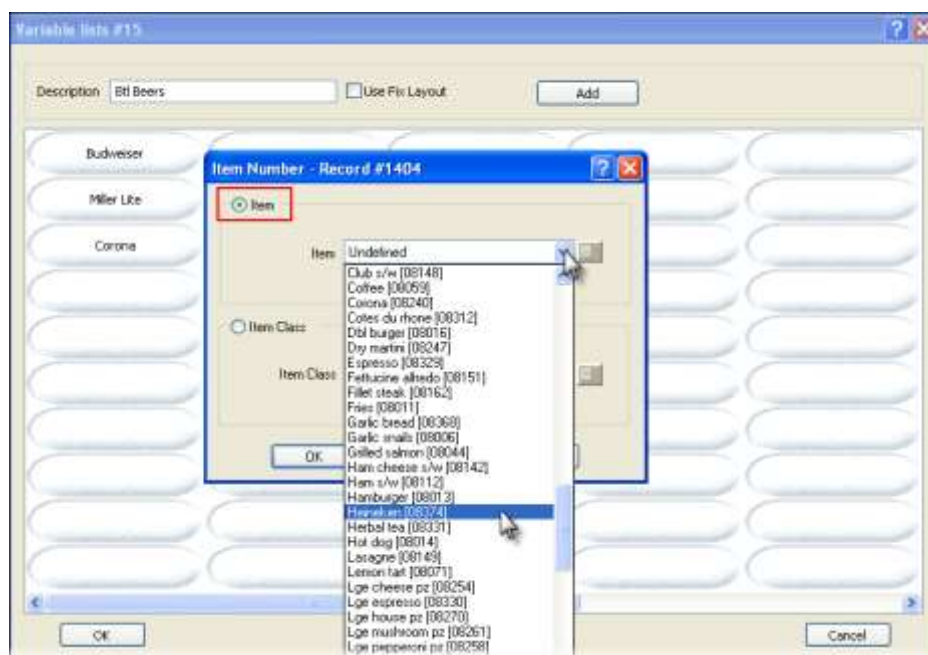
To add a new item to a variable list, double click on the appropriate list or click once and click on **Modify**



Click on the next available space



Click on the drop down menu and look for the sales item you wish to add to this variable list



**Note: Item is selected by default.
Item Class will be explained in more details later in this chapter.**

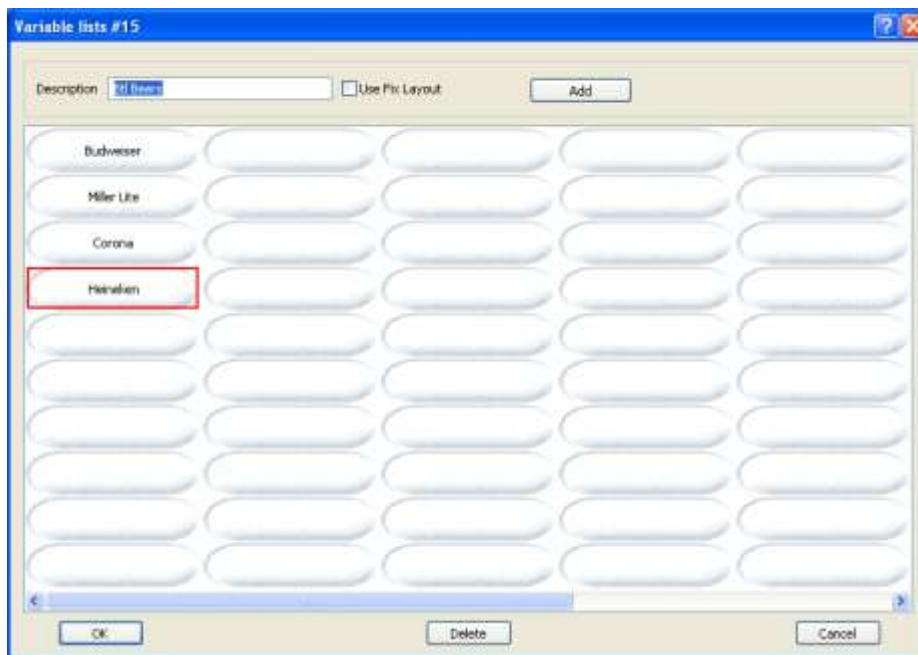
Click on OK



You can also type the first letters of the sales item to narrow down the list



Click on OK

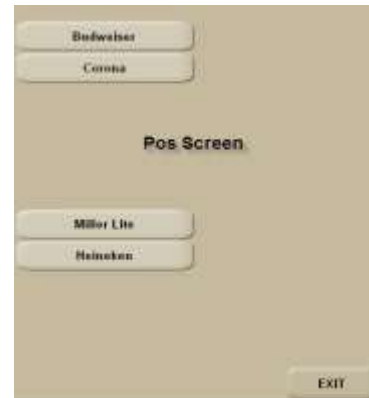


The sales item has been added to the variable list and will now be available for ordering on the POS.

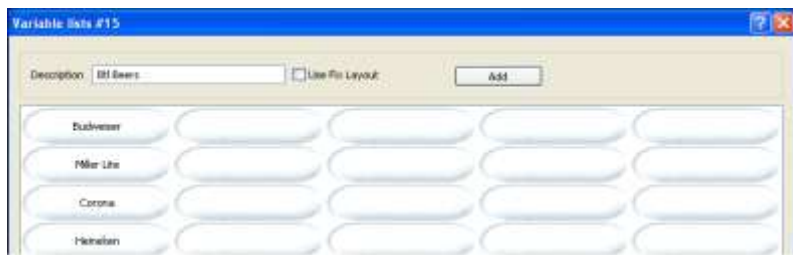
Use Fix Layout – enable this option so that your variable list remains in the same order on the POS screen. See the examples below:



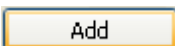
The items are displayed exactly as the layout of the variable list.



When not enabled the items display in this order with a gap in the middle.



We recommend you add sales items without leaving blank spaces in between. The variable list will always display the items in sequence.

The  **Add** function can be used to add groups of items as opposed to single items.
Click on Add

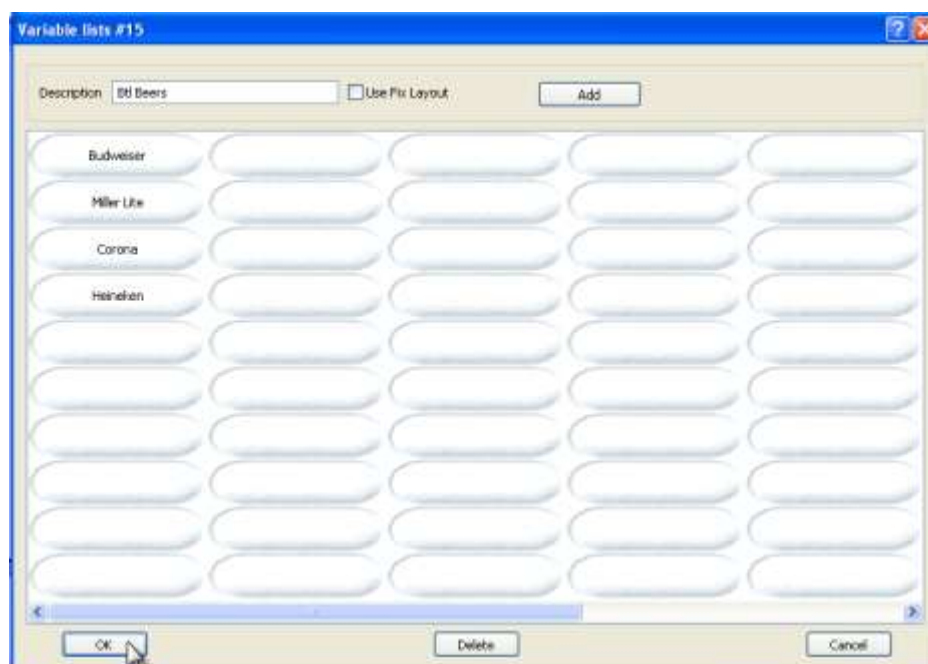


Select the Division from the drop down list and highlight the sales item you would like the variable list to start from.

Indicate how many items from the list you would like to include.

Always enable the Remove existing items option, as the variable list may contain previous sales items.

Click OK to close the window



Variable lists are also used to group modifier items as shown below

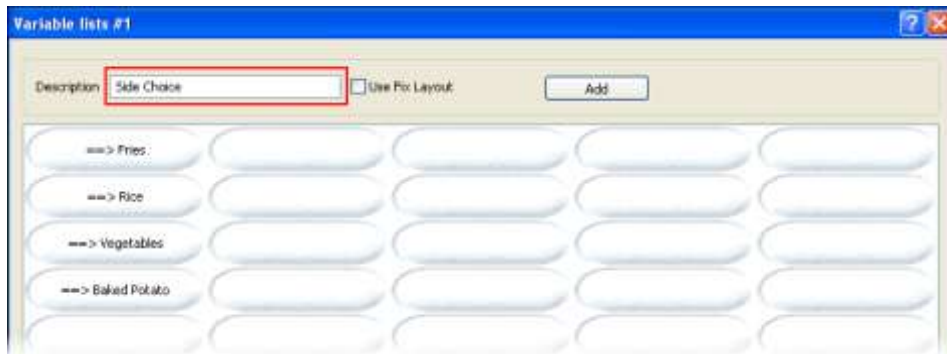


Variable lists #5

Description: ☐ Use Fox Layout

==> Rare				
==> M/Rare				
==> Medium				
==> M/Well				
==> WellDone				

Cooking options



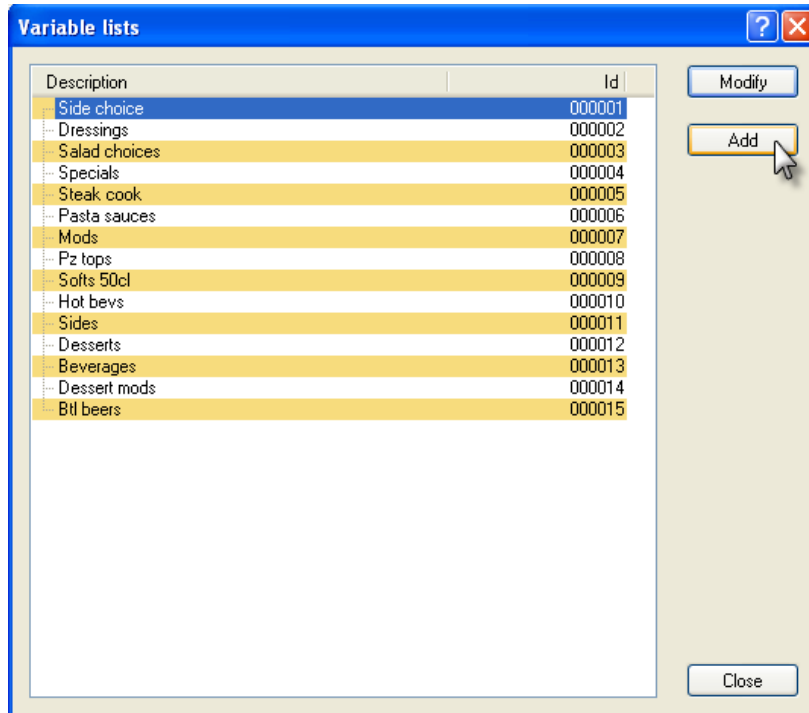
Variable lists #1

Description: ☐ Use Fox Layout

==> Fries				
==> Rice				
==> Vegetables				
==> Baked Potato				

Side options

**You might wish to create a new variable list at some point.
Click on Add**



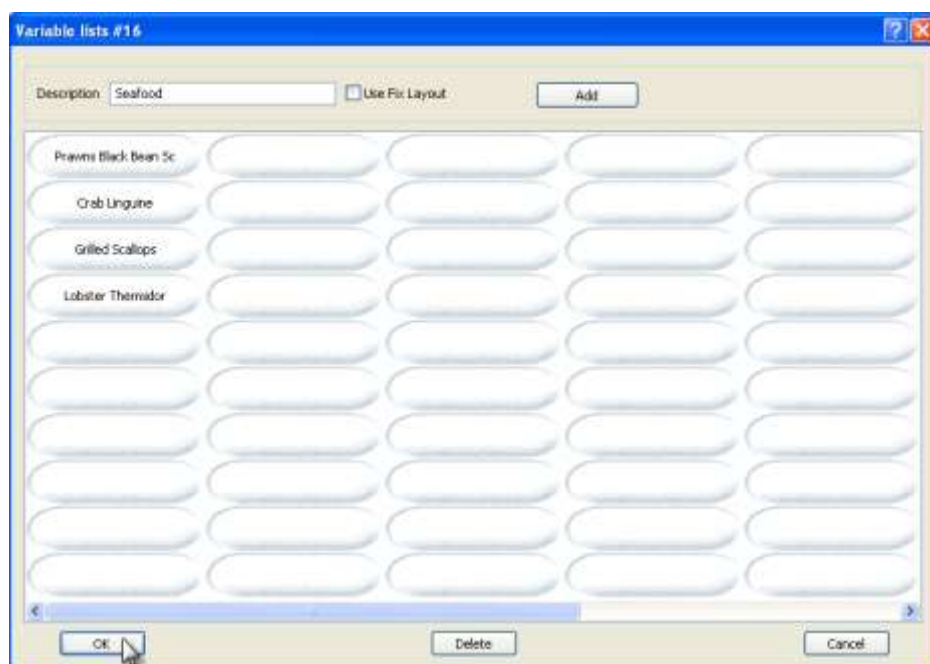
Variable lists

Description	Id
Side choice	000001
Dressings	000002
Salad choices	000003
Specials	000004
Steak cook	000005
Pasta sauces	000006
Modes	000007
Pz tops	000008
Softs 50cl	000009
Hot bevs	000010
Sides	000011
Desserts	000012
Beverages	000013
Dessert mods	000014
Btl beers	000015

Type in the variable list description and add the sales items as shown previously.



Click on OK – it's done!!



Variable lists require updating on a regular basis, as sales items are removed from menus, wine lists etc...



To remove an item from a variable list select the item and click on Delete in the item box.

NB: the sales item will NOT be deleted from the database.

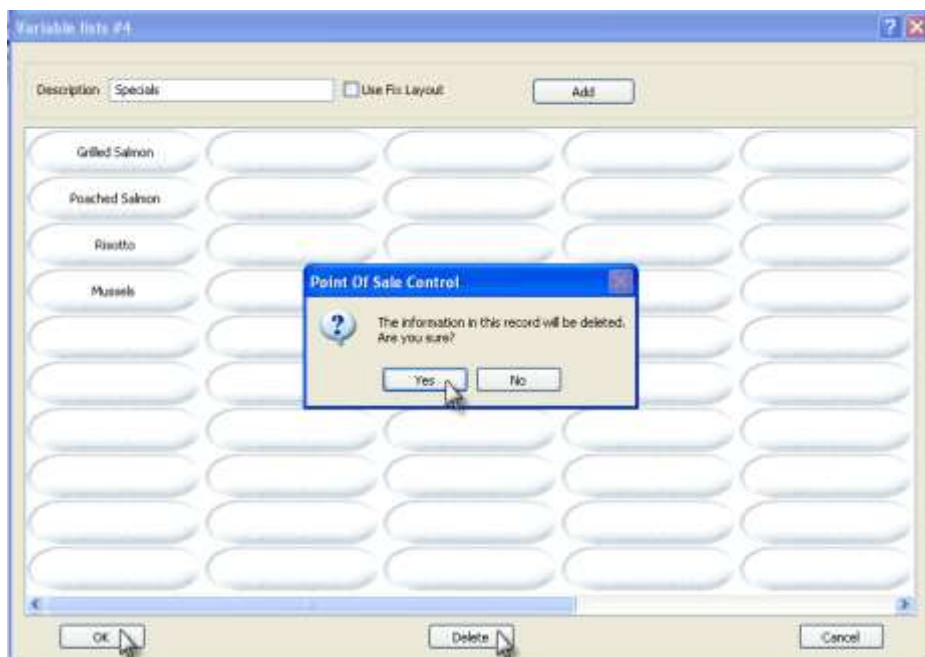


To remove the variable list, click on Delete.

Click on Yes when prompted and click on OK. Click on OK to close.

The variable list will no longer be available.

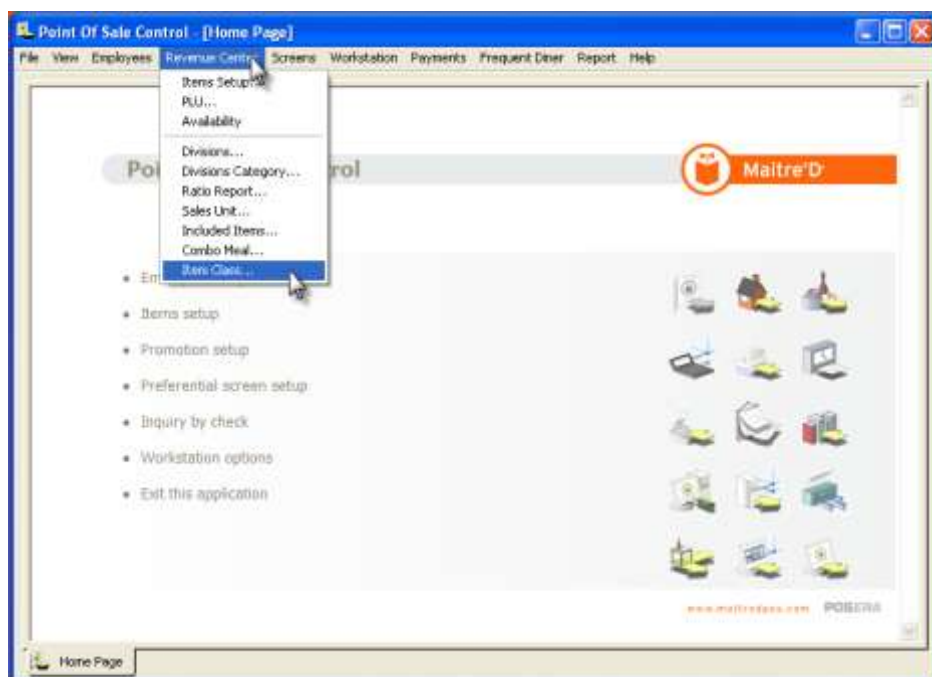
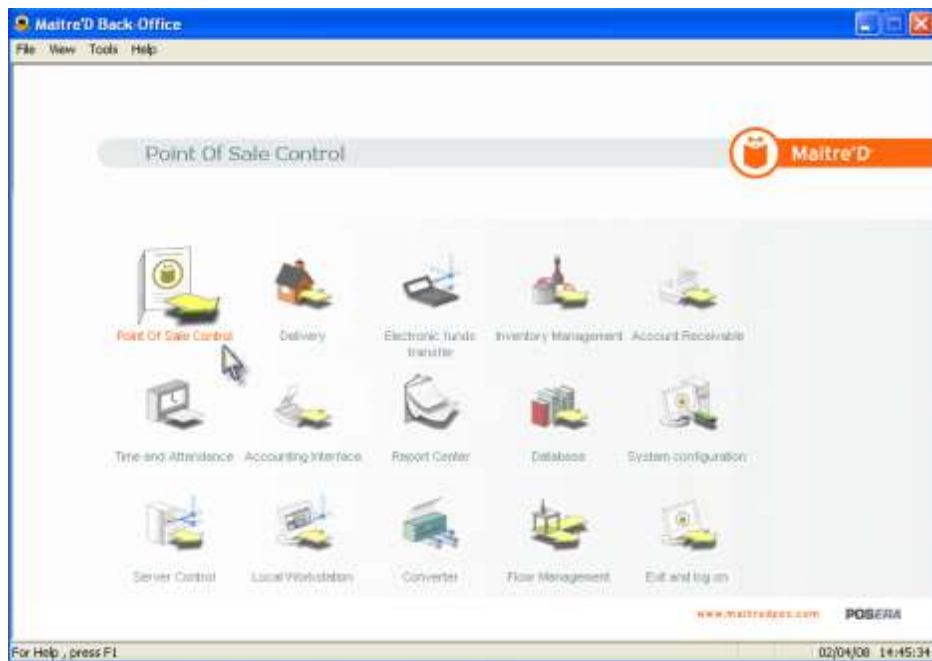
NB: the sales items will NOT be deleted.



Item Classes



From the back office select **Point of Sale Control**
Click on **Revenue Center**
Click on **Item Class**

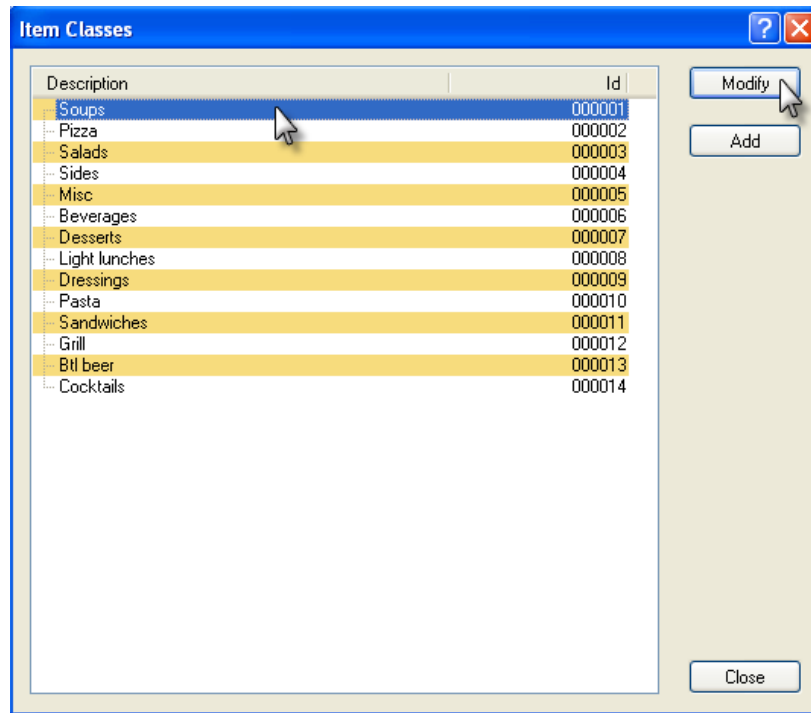




Item classes are similar to variable lists – they contain sales items which can be ordered from the POS.

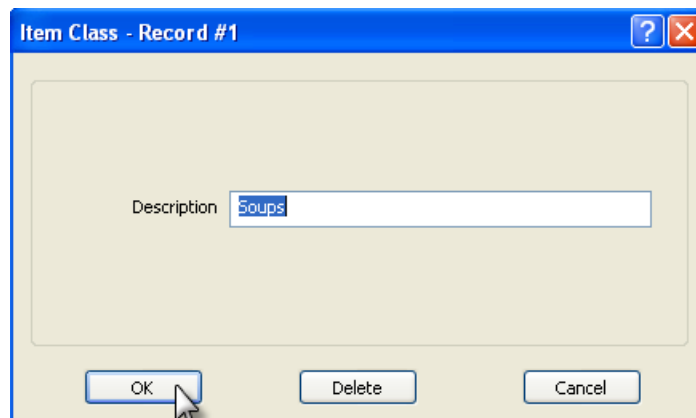
But unlike variable list the item class option is flagged in the sales items. The following window displays the item classes. See example below:

Double click on Soups or click once and click on Modify



The window only contains the description of the item class. There are no other options.

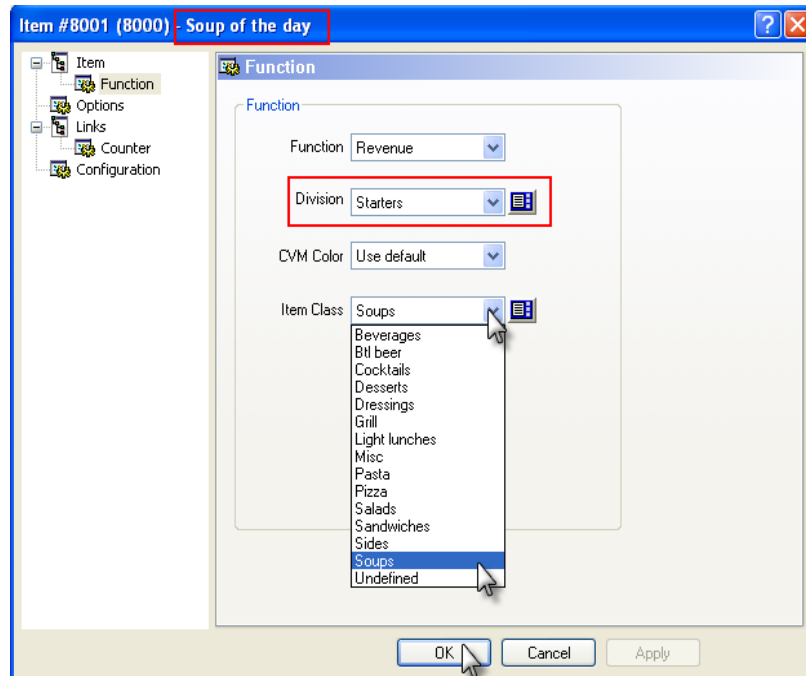
Click on OK





The sales items have an option to link them to item classes.

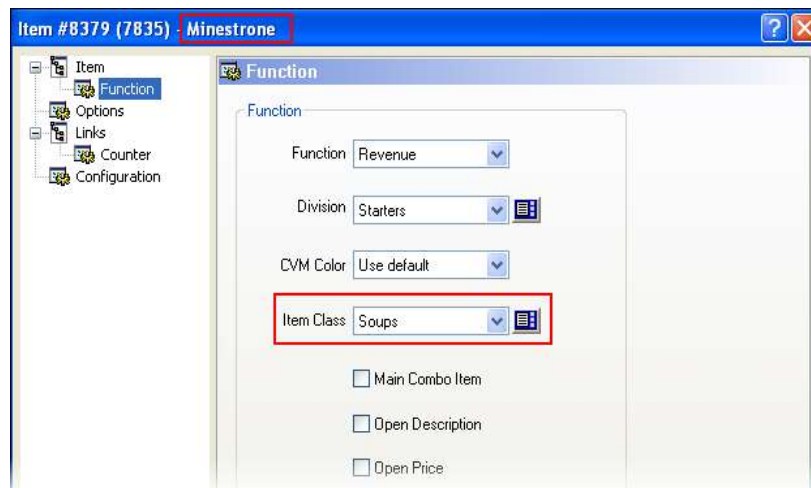
See the screen below:



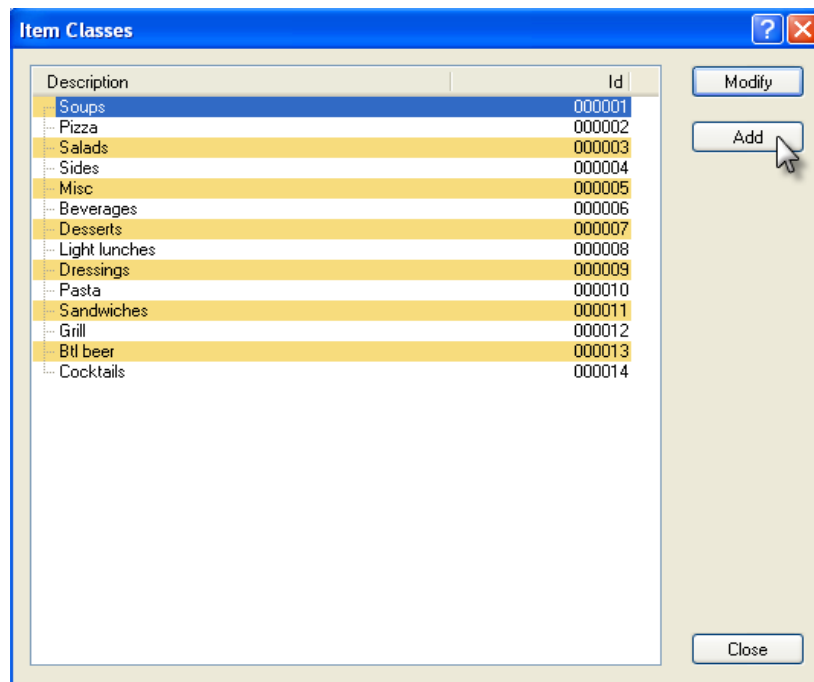
NB: Item classes are not the same as divisions.

Item classes are only used to group items – you cannot generate sales reports by item classes.

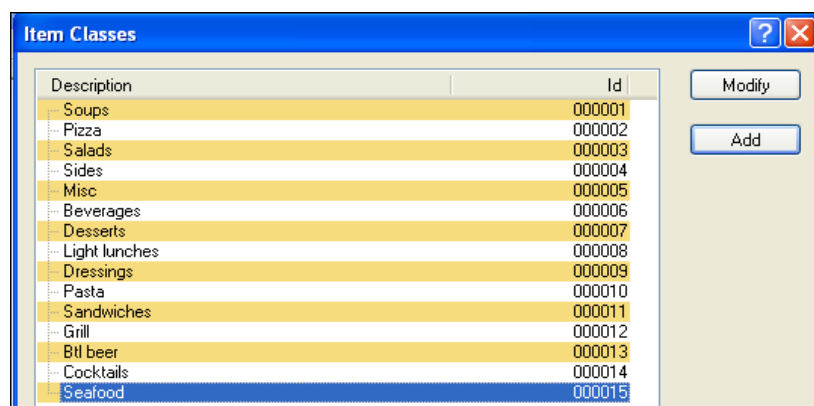
You can link all similar sales items to an item class.



You can create a new item class by clicking on Add



Type in the description and click OK



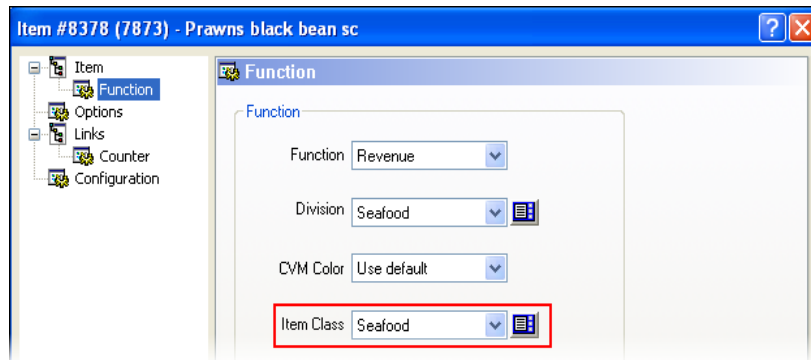


NB: When duplicating items remember all the options are copied to the new item – including the item class the sales items are linked to.

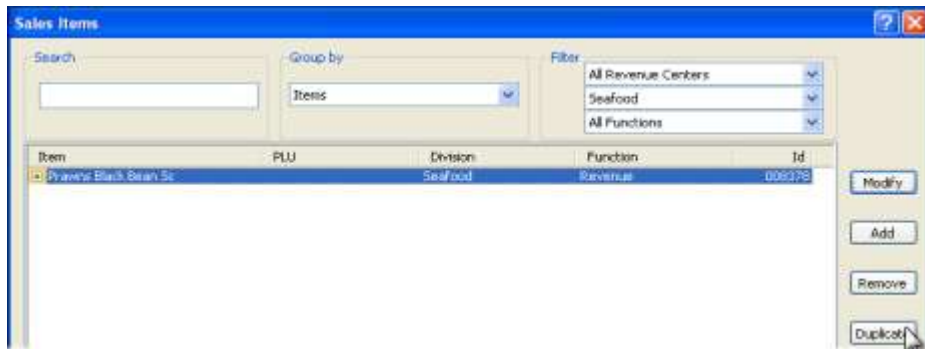
While this may be desirable for some sales items, it might not always be the case.

See the examples 1 and 2 below.

Example 1: creating a new sales item in the Seafood division



The sales item is linked to the Seafood item class



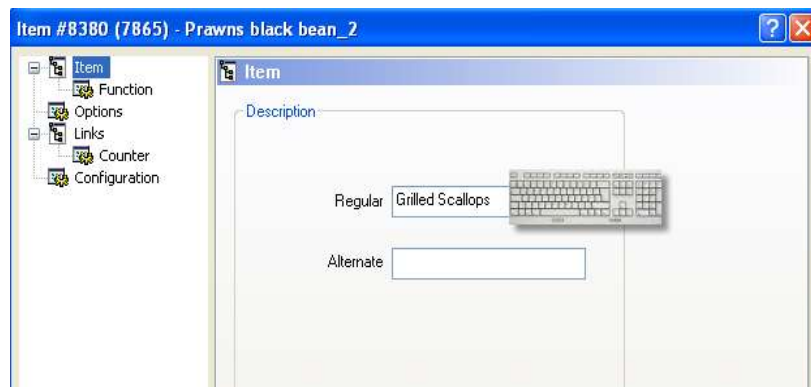
Item	PLU	Division	Function	Id
Prawns Black Bean Sc		Seafood	Revenue	008378

Sales item is duplicated to create new sales item

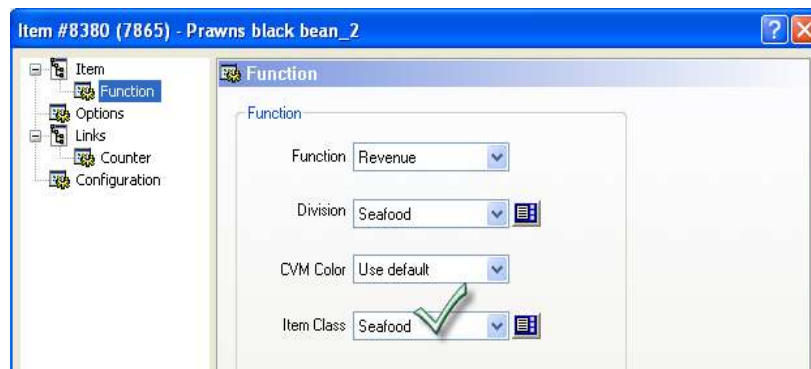




Type in description of the new sales item



New sales item is already linked to the Seafood item class



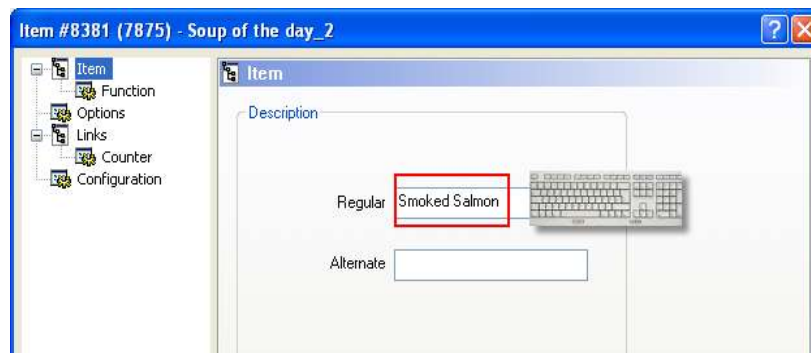
The new sales item will be available for ordering on the POS from the Seafood item class.

Example 2: creating a new sales item in the Starters division





Type in the description



New sales item is linked to the Soup item class



The new sales item will be available for ordering on the POS from the Soup item class!

When you no longer wish a sales item to belong to an item class you need to set its item class as Undefined.



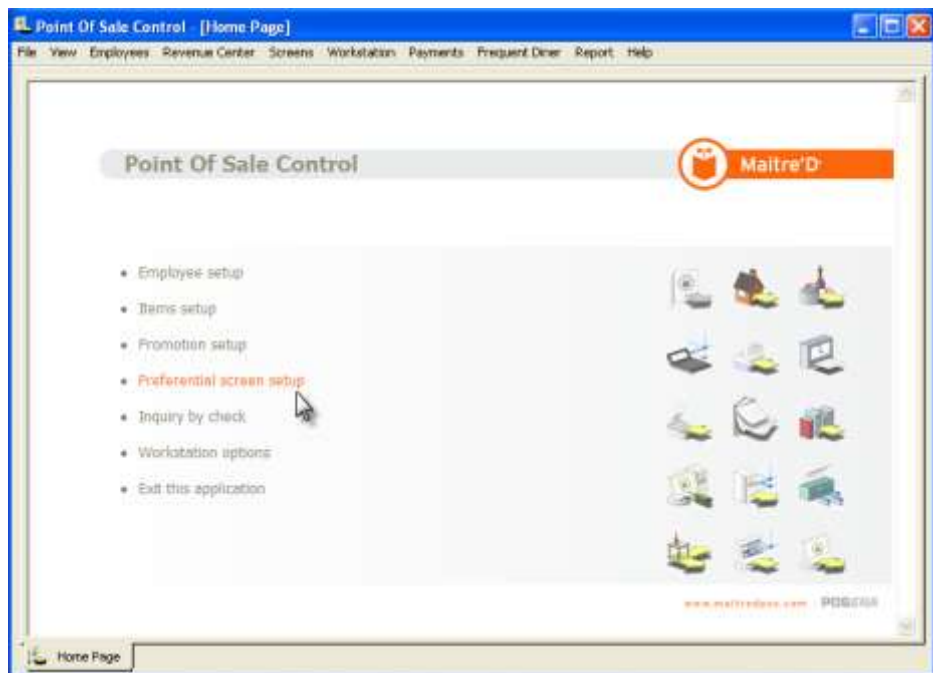
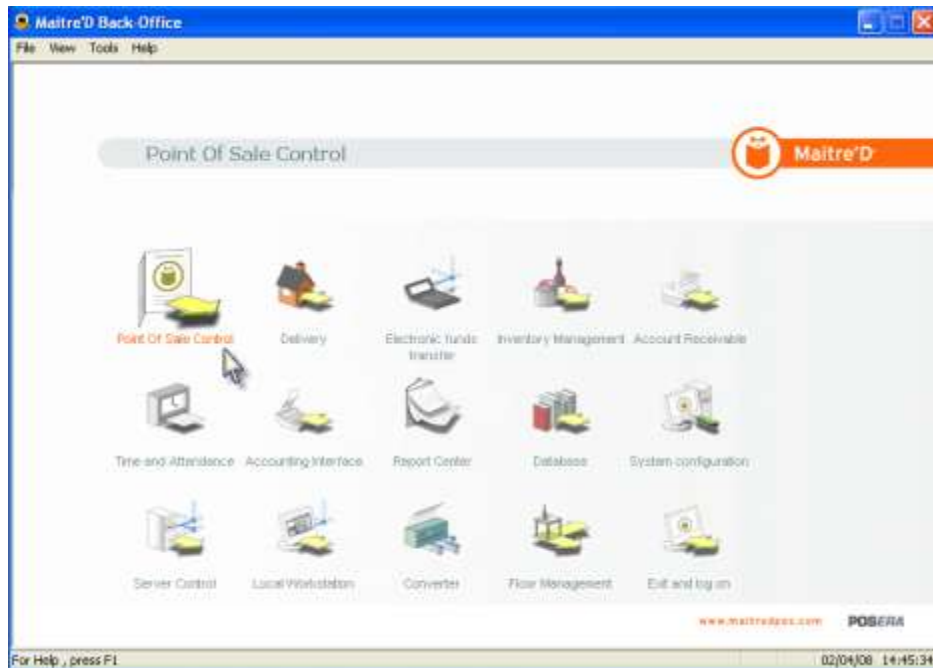
Now you have seen how to modify and create variable lists and item classes, the next chapter will show you how to assign them, as well as sales items, to preferential screens.



Preferential Screens

Preferential Screens

From the back office select **Point of Sale Control**
Click on **Preferential screen setup**

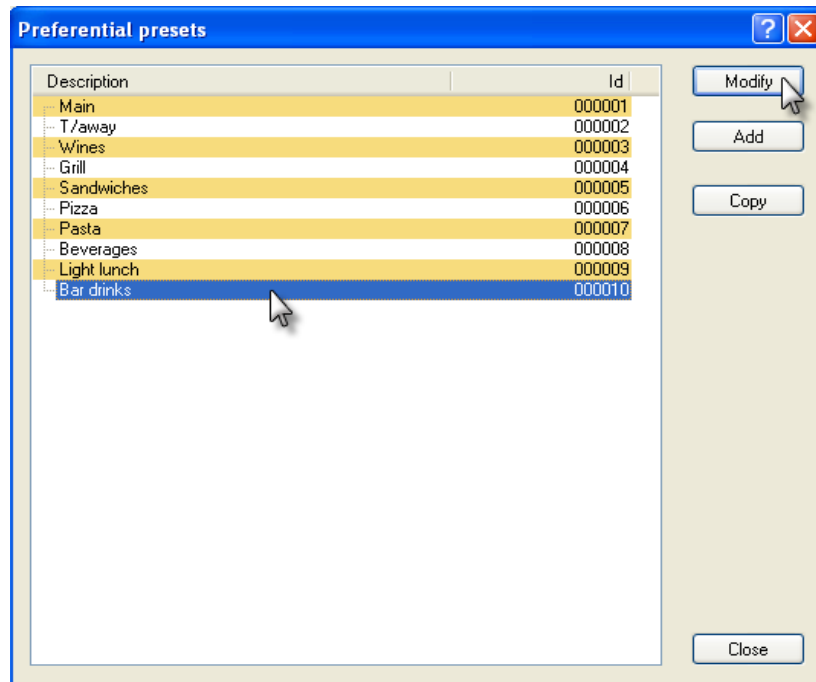




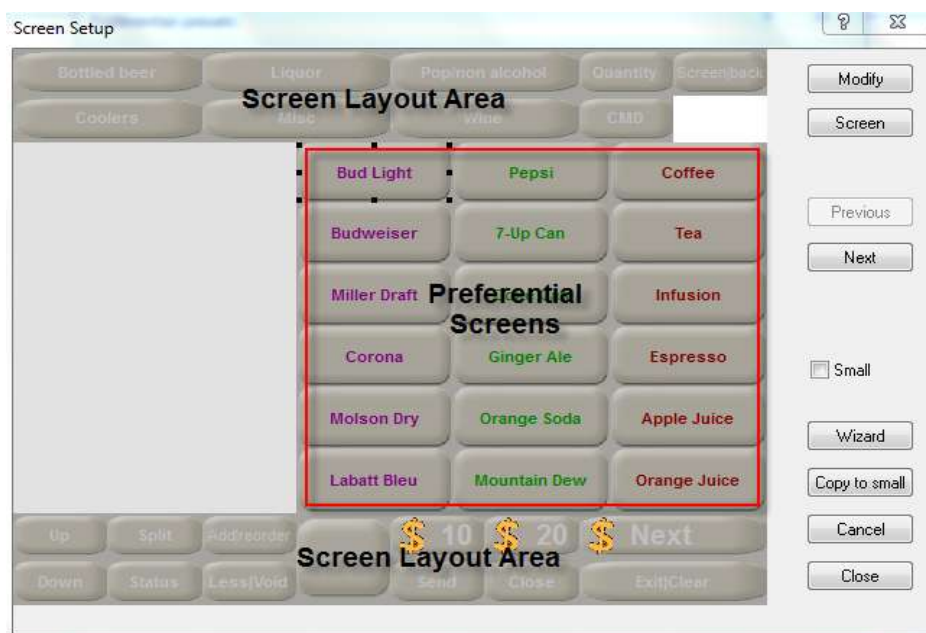
Preferential Screen Setup allows you to define and customize the order area of the POS screens.

You can assign sales items, variable lists and item classes to the preferential screens as well as links to other preferential screens.

The following window displays the preferential screens.
Double click on Bar Drinks or click once and click on Modify

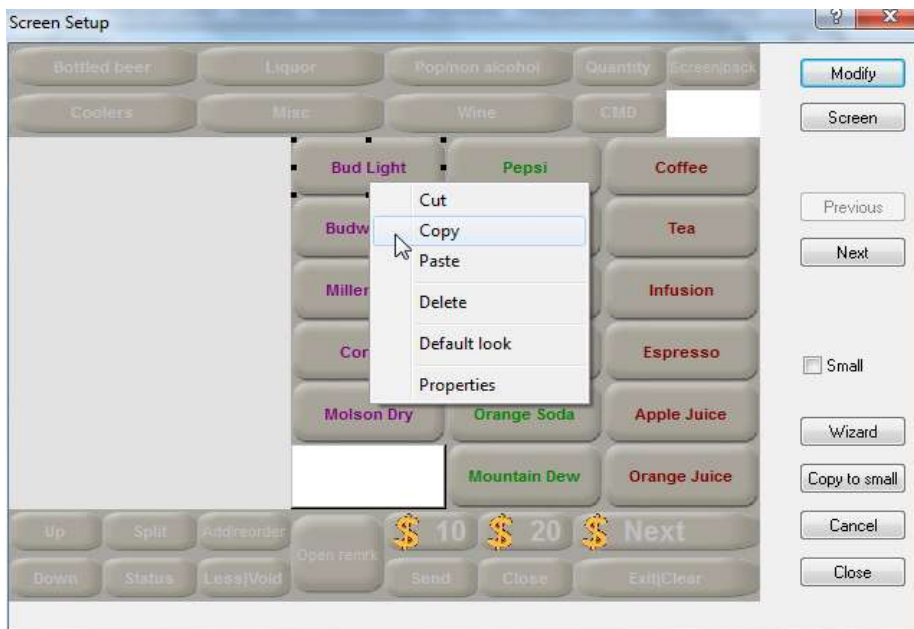


Screen layout areas cannot be modified and are reserved for your Maitre'D consultant – only preferential screens can be customized.

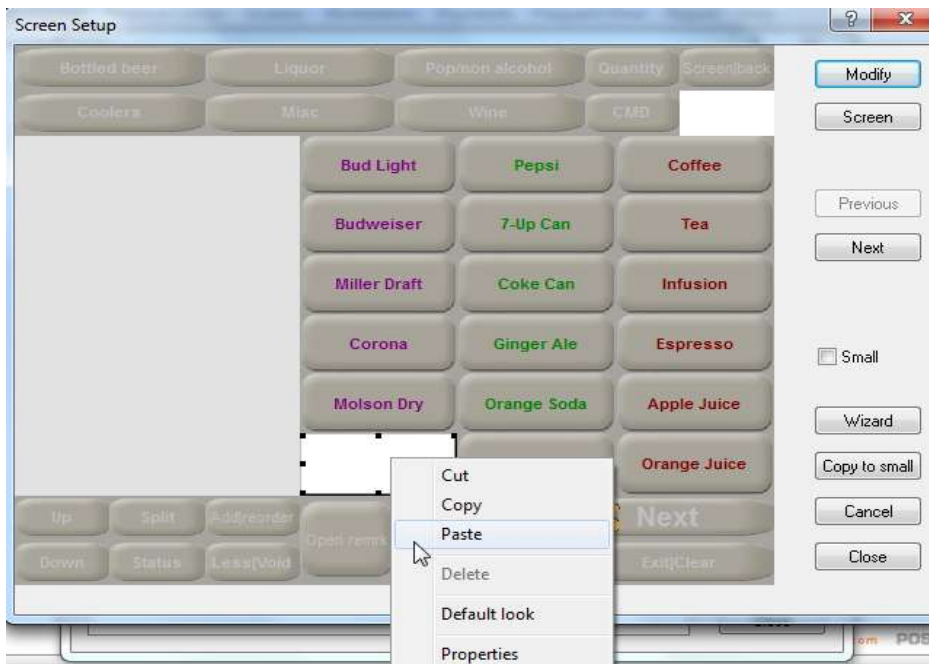




To add a new sales item to your bar drinks screen you can right click and copy an existing button already on the screen.



Right click on an empty space and click on Paste

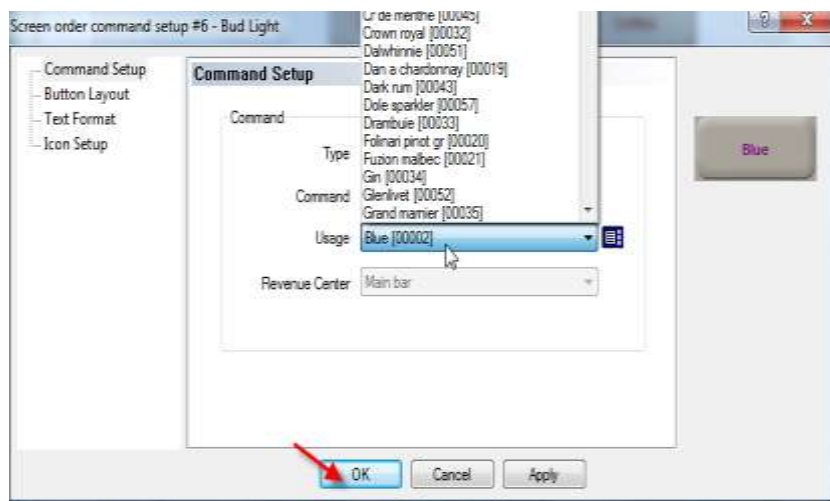


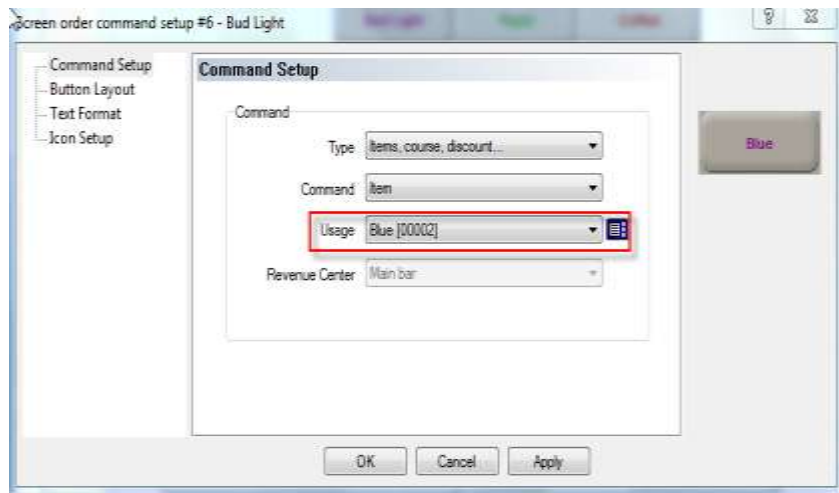


Double click on the copied button or click once and click on Modify



Click on the drop down menu and select from the sales item list and click OK





The new sales item will be available for selection on the POS screen.
As we have copied this button from a similar one – i.e. another bottle beer – we have the same set up and color etc...

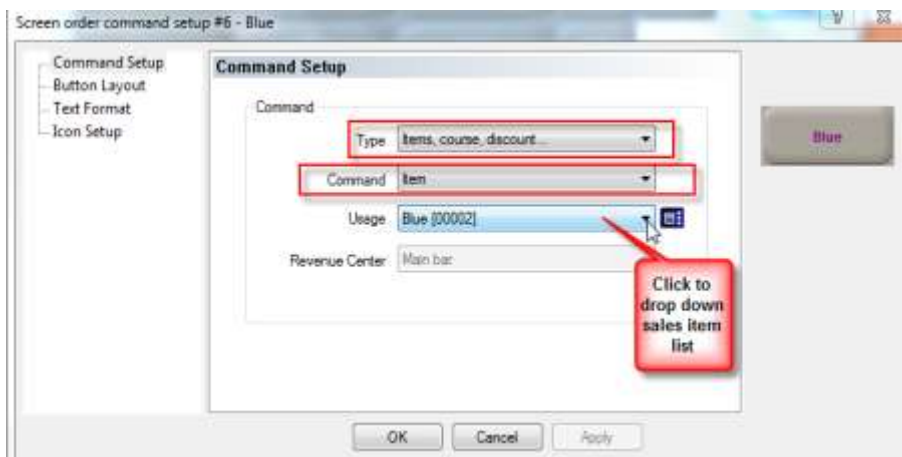


However let's briefly explain the other options in the set up of buttons.

Command Setup is the option to set the type for buttons and in turn the type selected will list the commands associated as shown below.

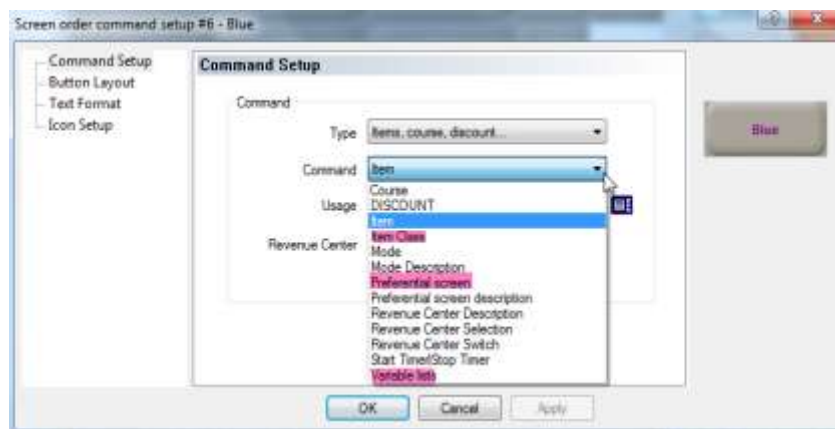
The most common type used in screens setup for buttons is Items, course, discount...

The most often used commands are Item, Variable List, Item Class and Preferential Screen

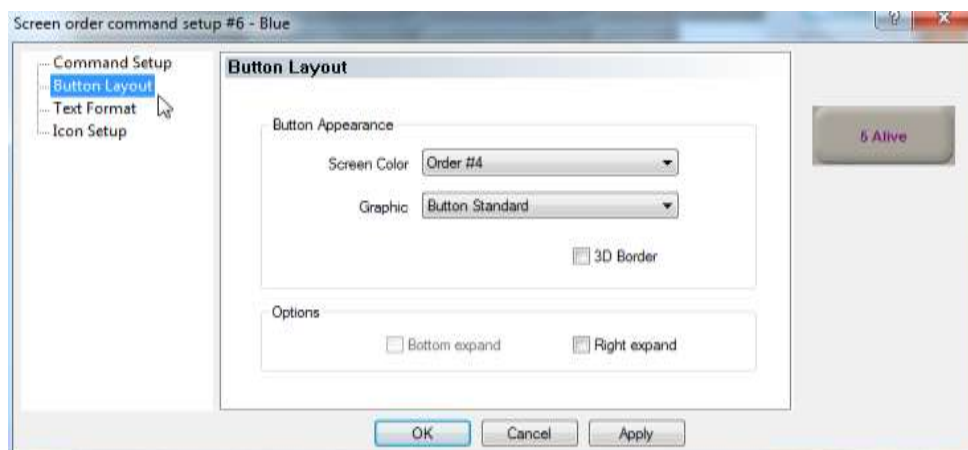


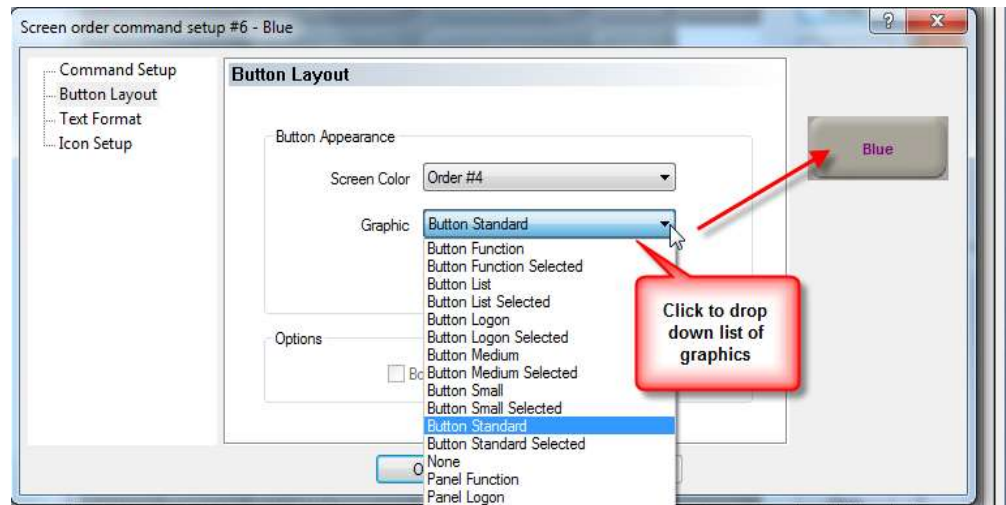
Listed below are the available types and commands.

Other types and commands required on a preferential screen, other than those highlighted below, would need to be set up with the help of your **Maitre'D** consultant.

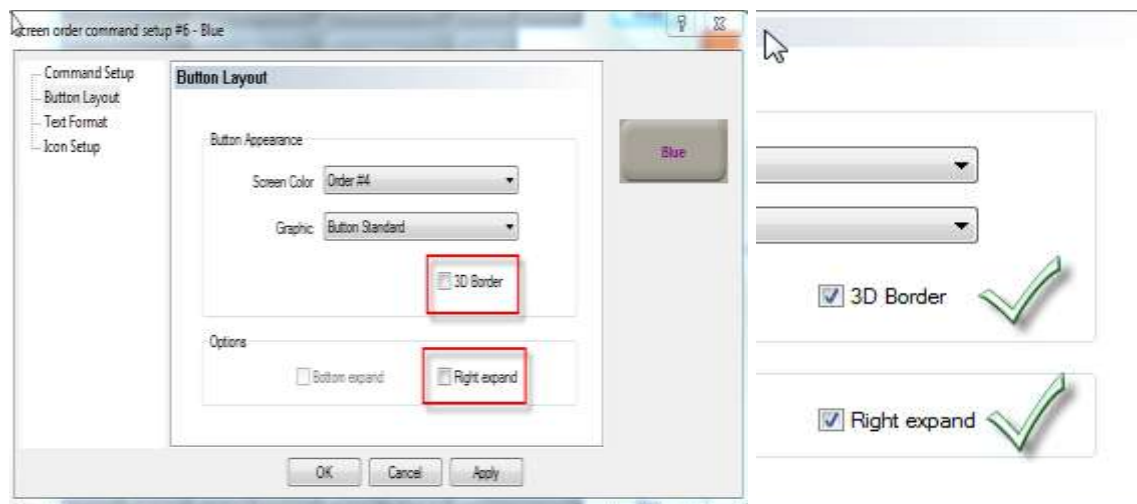


Button Layout is the option to define color, size and graphic of buttons





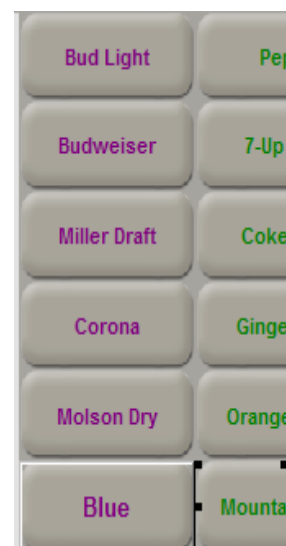
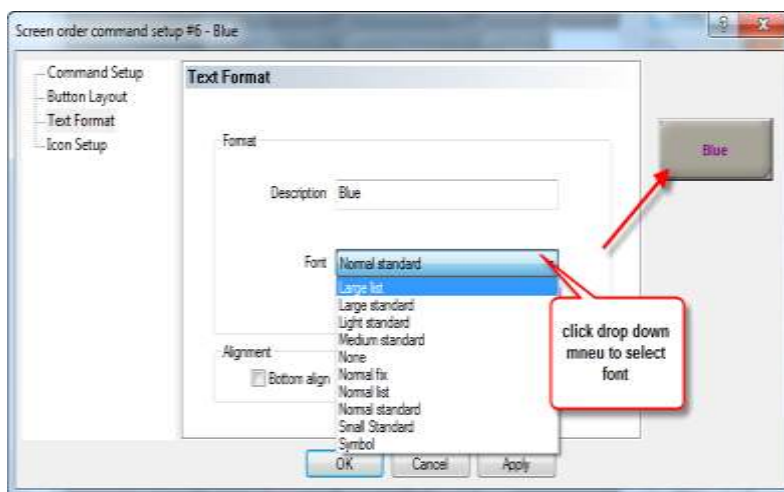
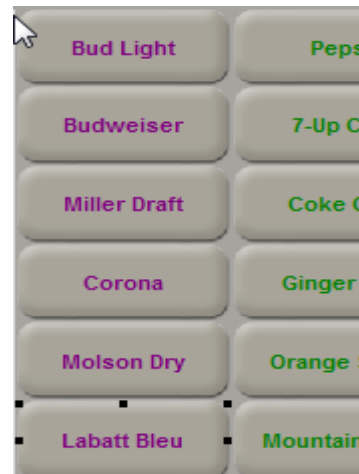
The option 3D Border is set to display the button with a three dimensional border.



Bottom and Right expand increases the button size on the preferential screen.

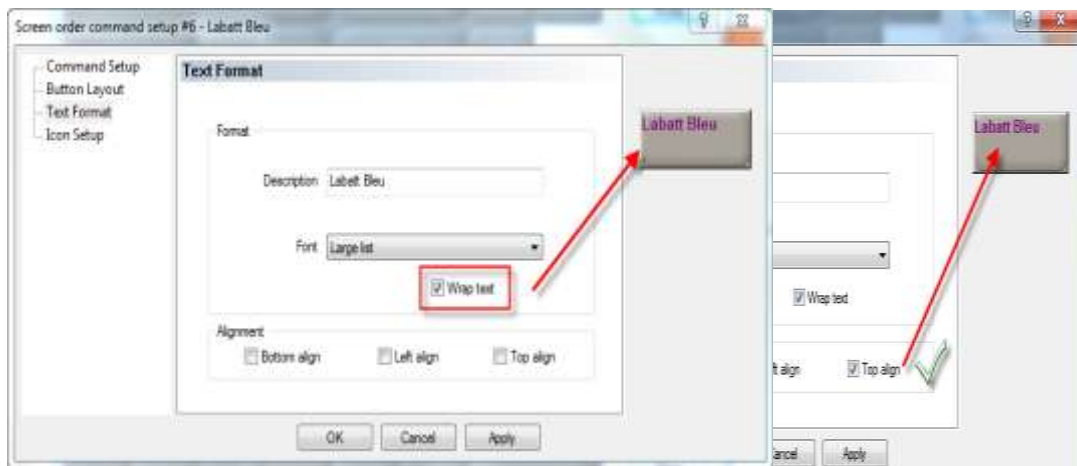


Text Format is the option to define font size and alignment of text.
Description refers to the button description, NOT the sales item description.



Wrap text option to use 2 available lines.

Bottom, Left, and Top align options, are used to display description accordingly; otherwise center alignment is used.



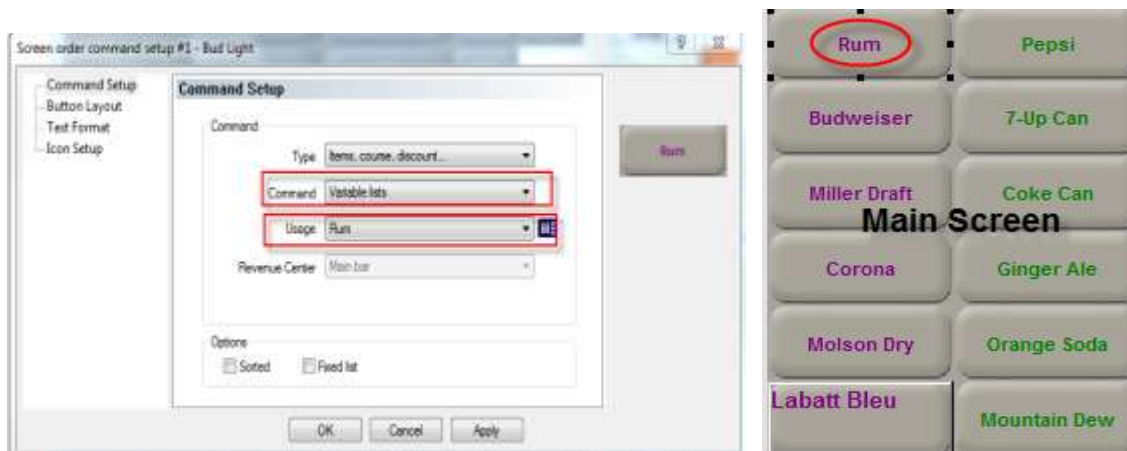
Icon is the option to add images to buttons. These images are predefined in the system.

If you require images not available on the predefined list, you will need to contact your **Maitre'D** consultant.

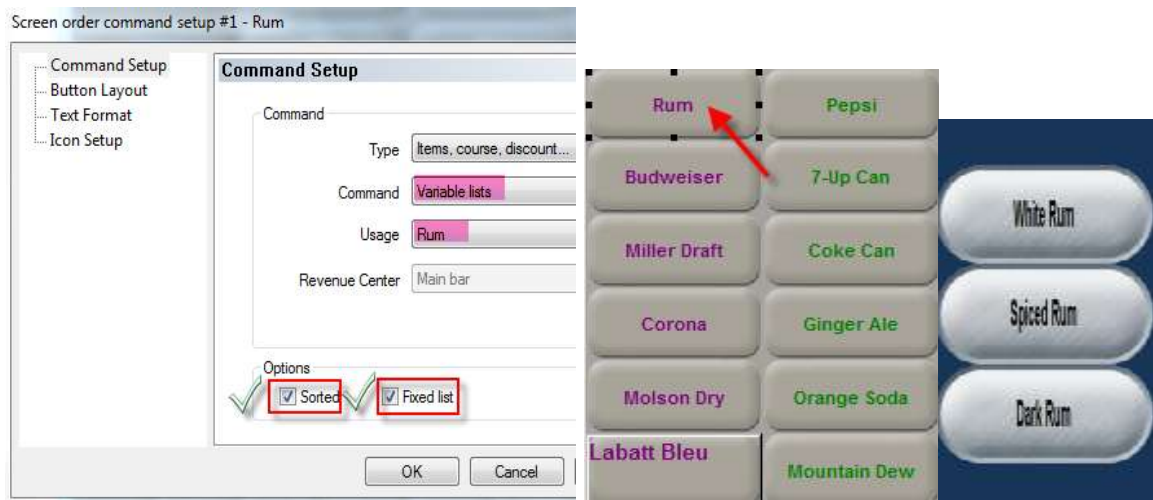
Click on Apply and OK to Close

Variable lists, item classes and preferential screens can also be assigned.

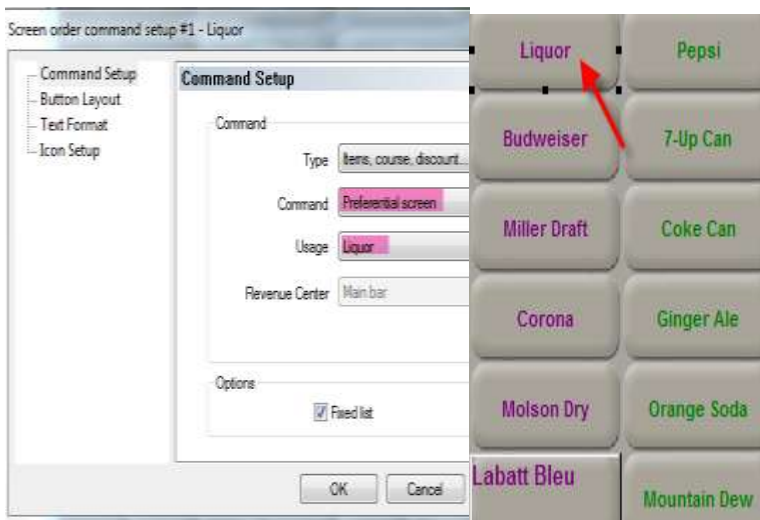
See the variable list assigned on Main screen below:



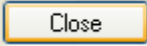
The option **Sorted** will arrange the variable list in alphabetical order.
The option **Fixed list** keeps the list on the screen to allow ordering of multiple items; un-check it if you wish to return to the main menu after selecting only one item.



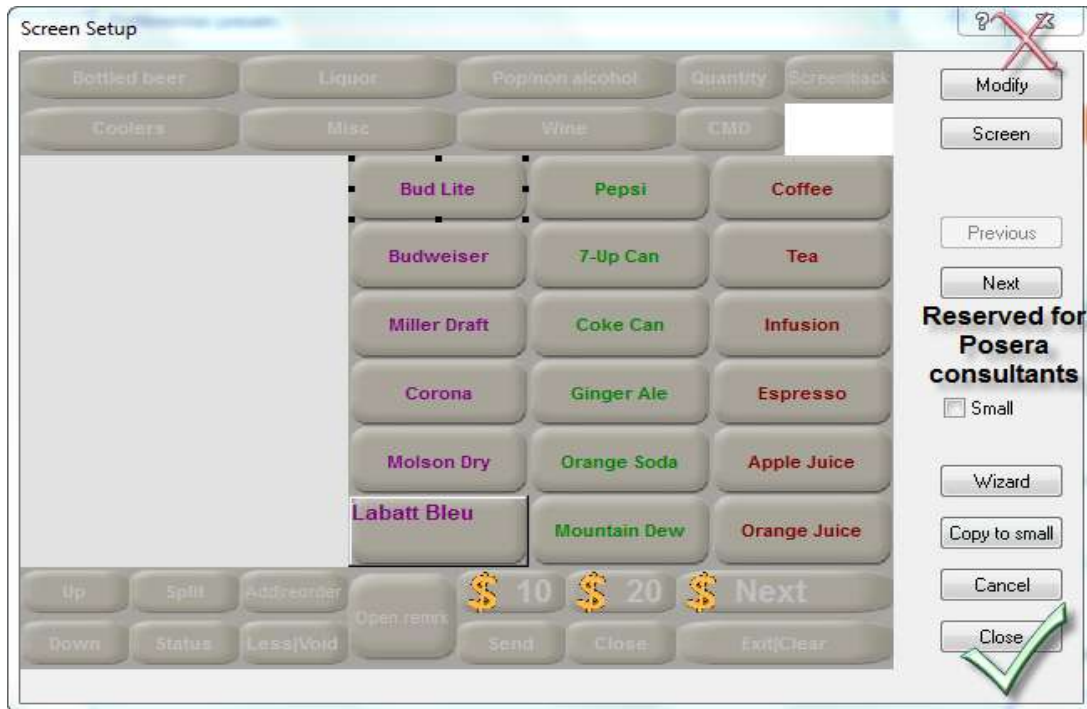
See the preferential screen assigned on Main screen below:





When making changes to preferential screens always remember to close the screen with the  button.

Do NOT use the  on the top right hand side of the window – this will not save the changes!!



The options on the right: Modify, Screen, Next, Small, Wizard and Copy to small are reserved for **Maitre'D** consultants. **DO NOT USE THESE OPTIONS.**

Screen design requires a good deal of planning to ensure you have all the links to the right items, variable lists etc... in order to minimize the number of key strokes needed for ordering sales items on the POS.

Always proceed with a great deal of care when carrying out screen modifications.

Should you need to create new screens, or if you are unsure how you should approach preferential screens modifications, please contact your **Maitre'D** consultant who will be happy to provide you with additional training.



Modifiers

Modifiers are remarks attached to sales items to make sure the correct information is printed on the kitchen / bar printers.

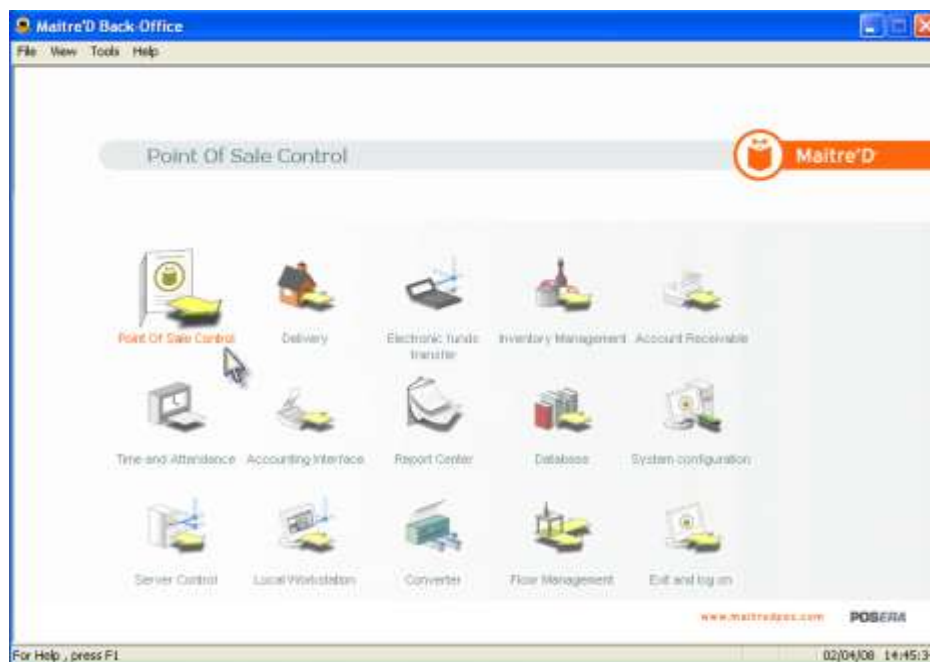
Modifiers are usually free but may be priced. The system does not print modifiers on the guest check unless there is a charge associated with them. The most common modifier items describe how a customer wants an item prepared, such as a steak or to specify an accompanying vegetable or sauce. These are called weight modifiers and come up for selection after the main item has been selected.

Generic remarks not attached to particular sales item – such as No Salt for example – are also modifiers; but do not come up for automatic selection and are usually found under a generic variable list called Food Mods.

There are four steps to weight modifiers

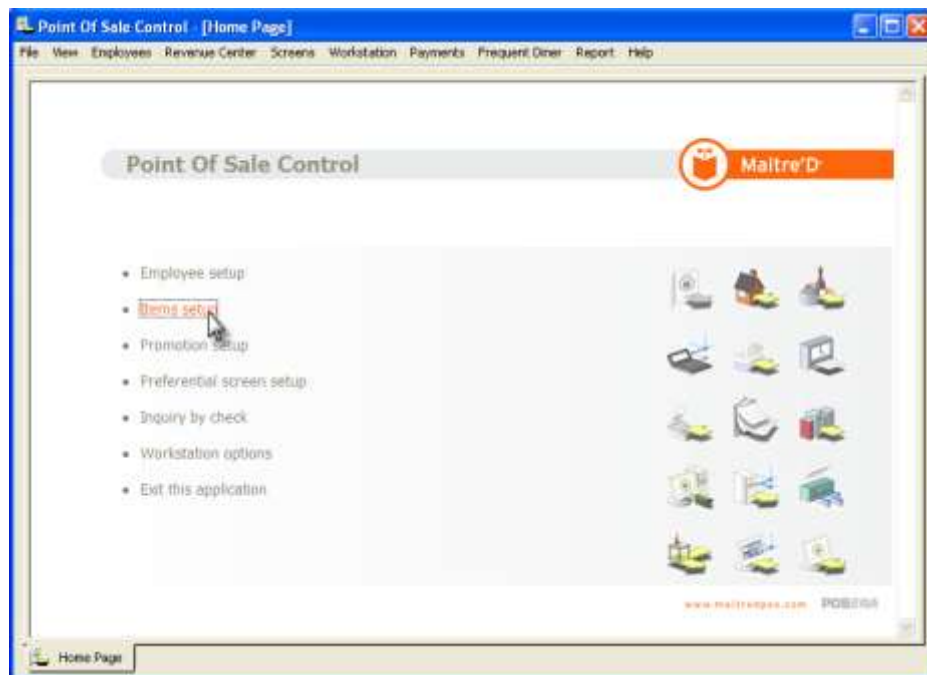
- **creating modifiers**
- **organizing modifiers in a variable list**
- **creating a weight modifier**
- **linking weight modifier to sales item**

From the back office select Point of Sale Control



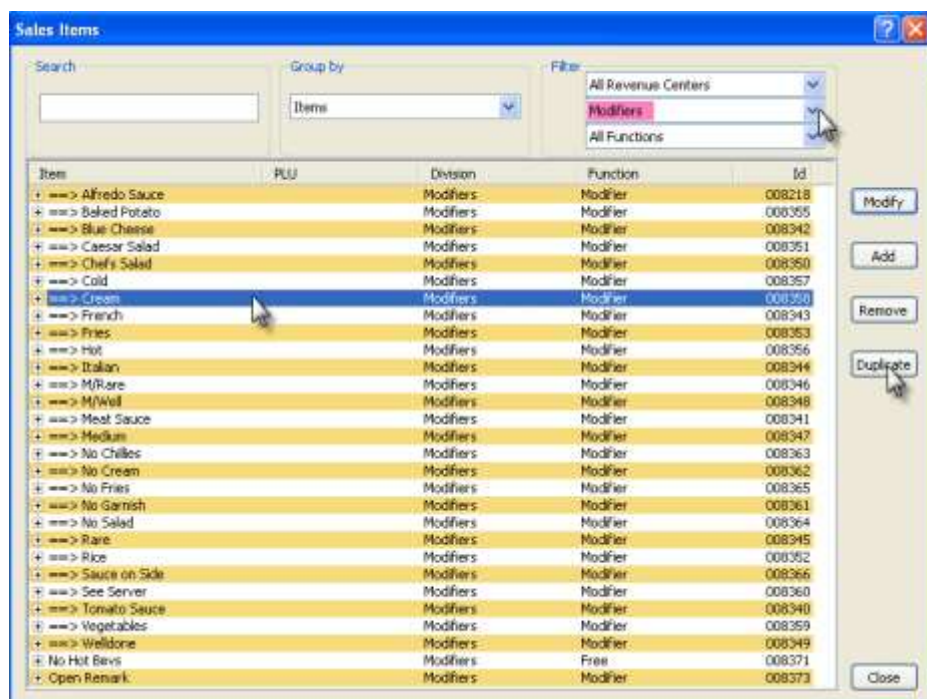


Click on **Item Set up**



We have already seen in a previous chapter how to add new items. Creating new modifiers follows the same logic – i.e. duplicating a similar item.

See example below:

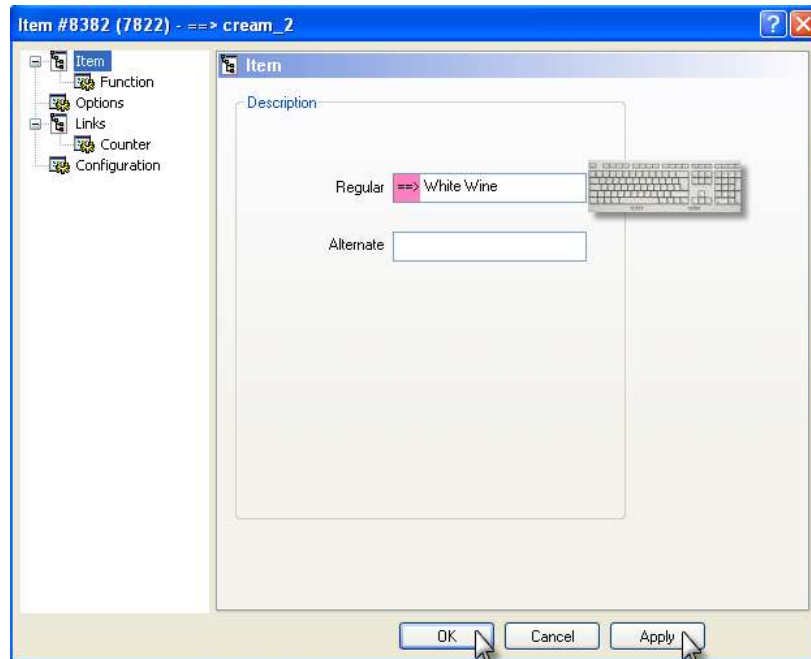




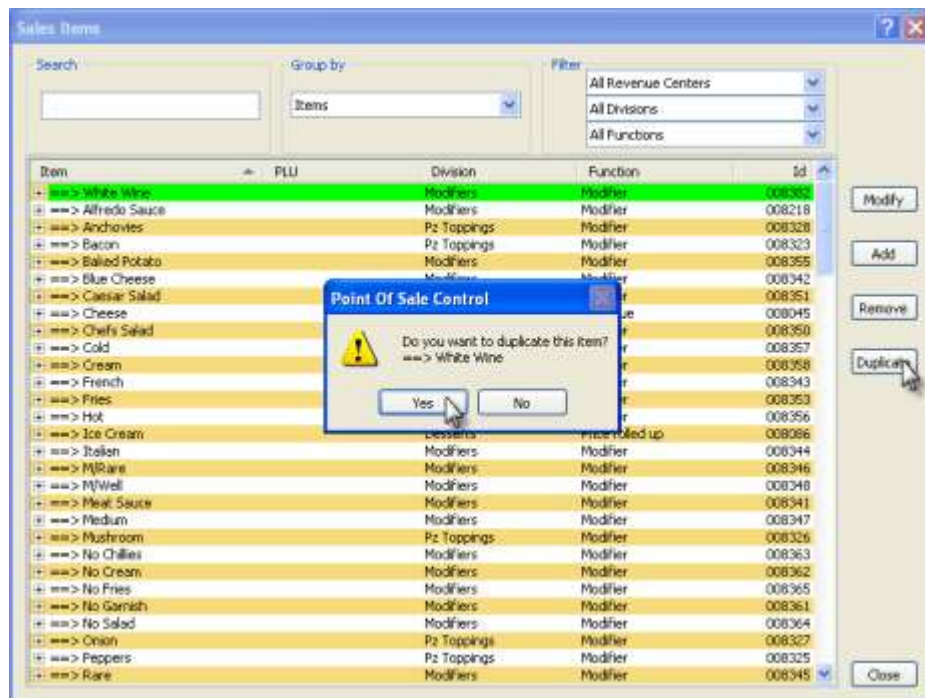
Enter a description.

**We often precede a modifier description by inserting the following ==>
This indents the remark on the check below the main sales item for easier reading in the kitchen; however this is not necessary.**

Click on Apply and OK

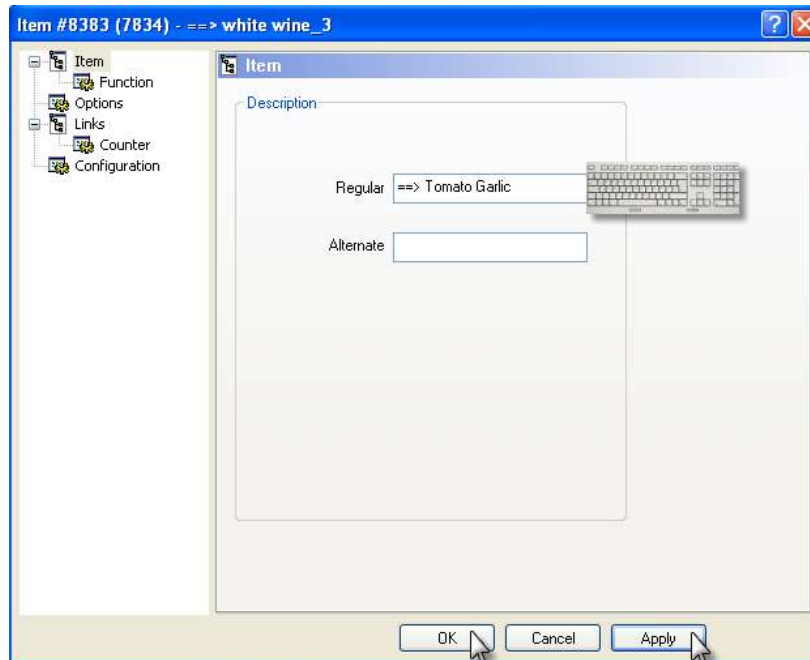


Now duplicate to create another modifier



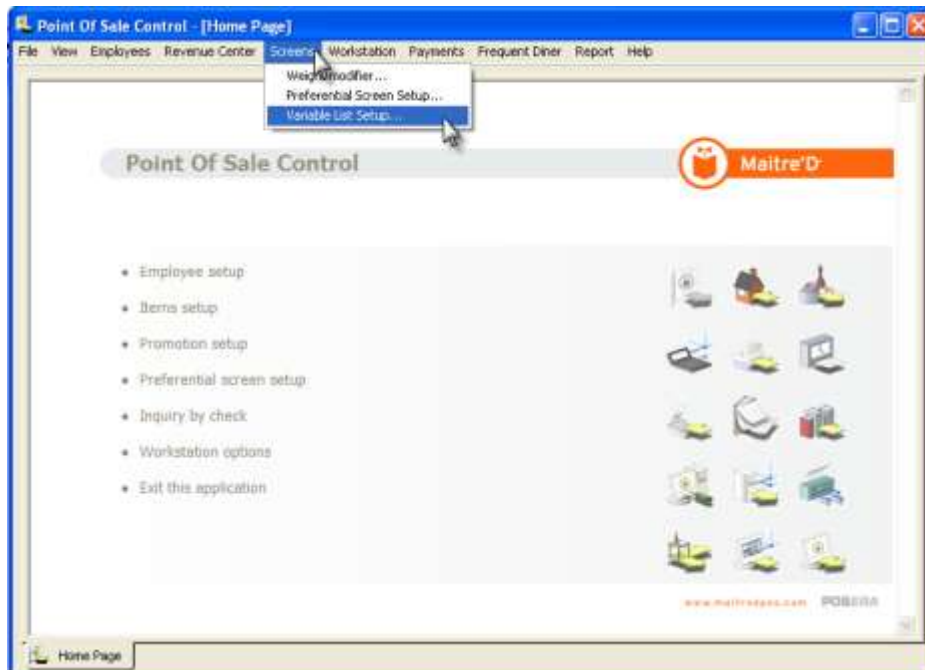


Enter description and click on Apply and OK



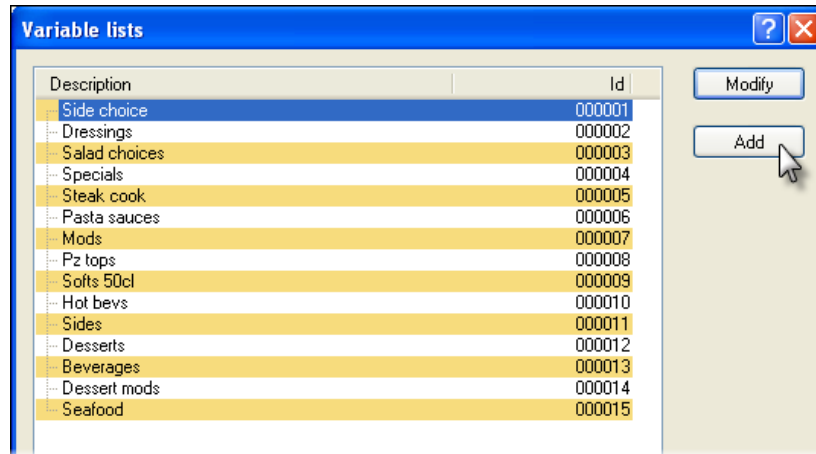
The modifiers have been created. The next step is to create a variable list.

Click on [Screens](#) and [Variable List Set up](#)

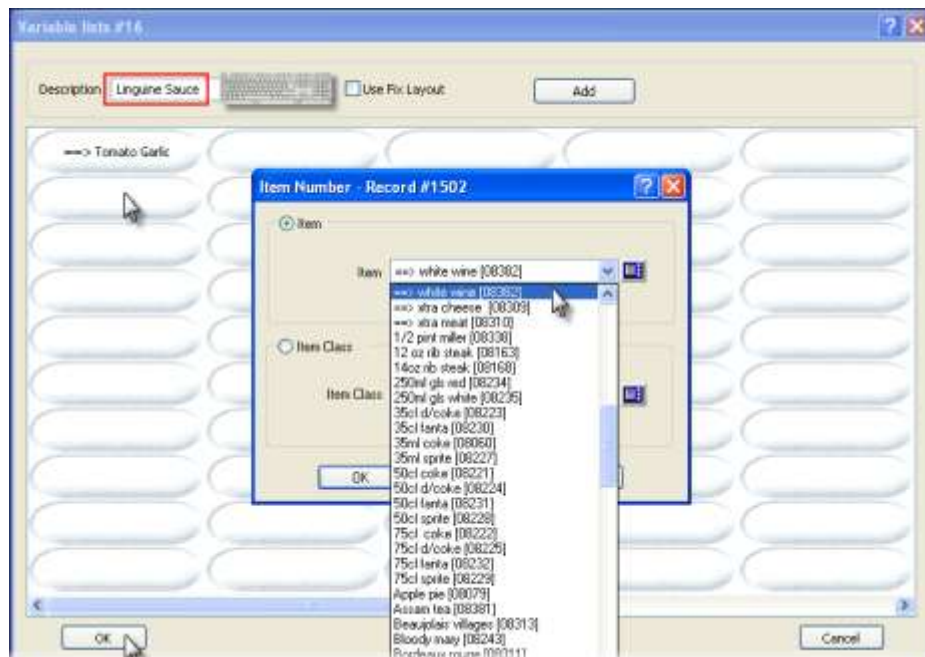




Click on Add



Type in description and add the modifiers to the variable list.

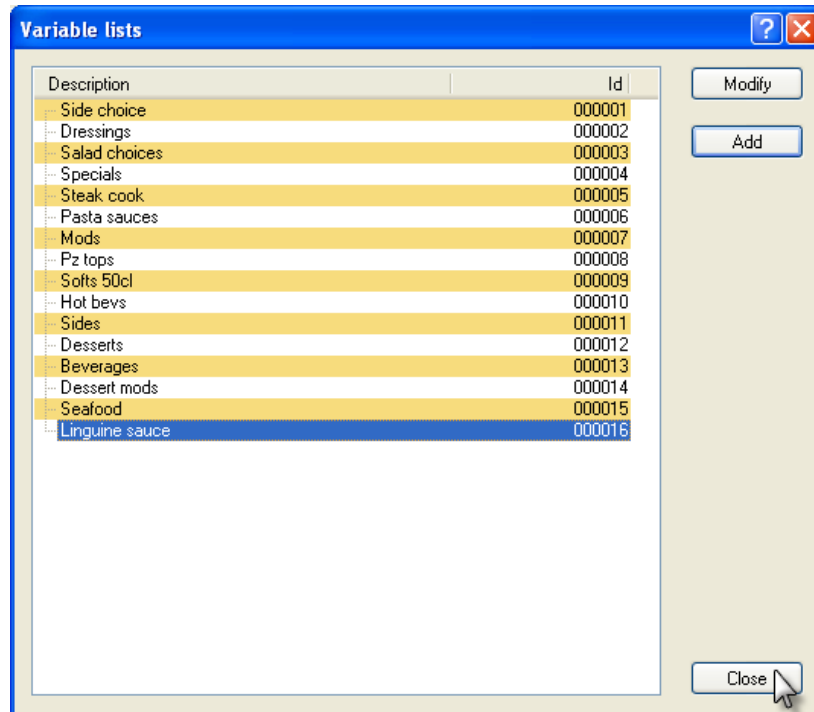


Click on OK to CLOSE when the list is completed (see below)



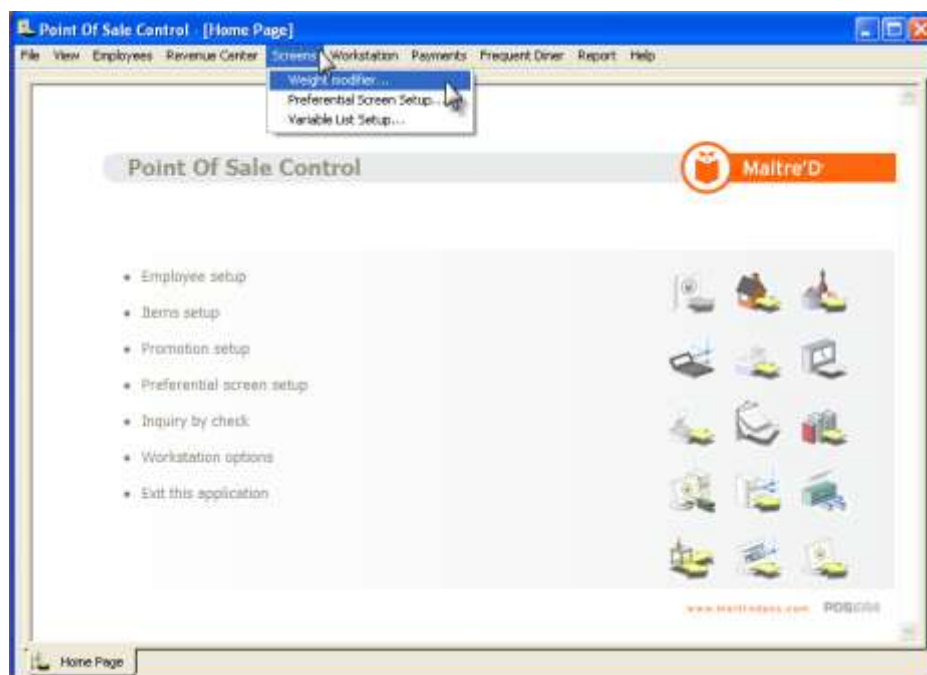


Click on **CLOSE**



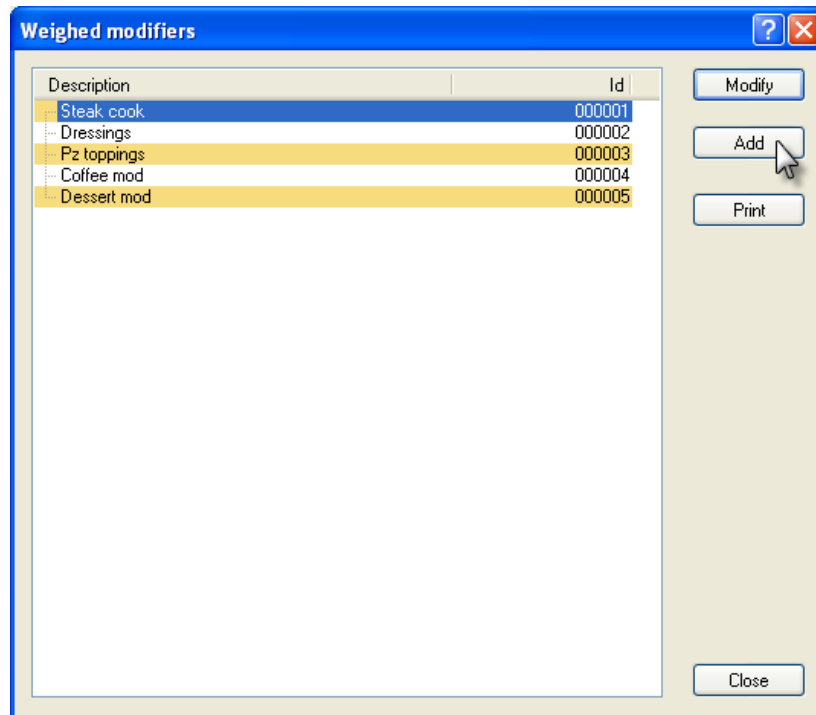
The variable list has been created. The next step is to create and configure a weight modifier.

Click on **Screens** and **Weight Modifier**





Click on Add

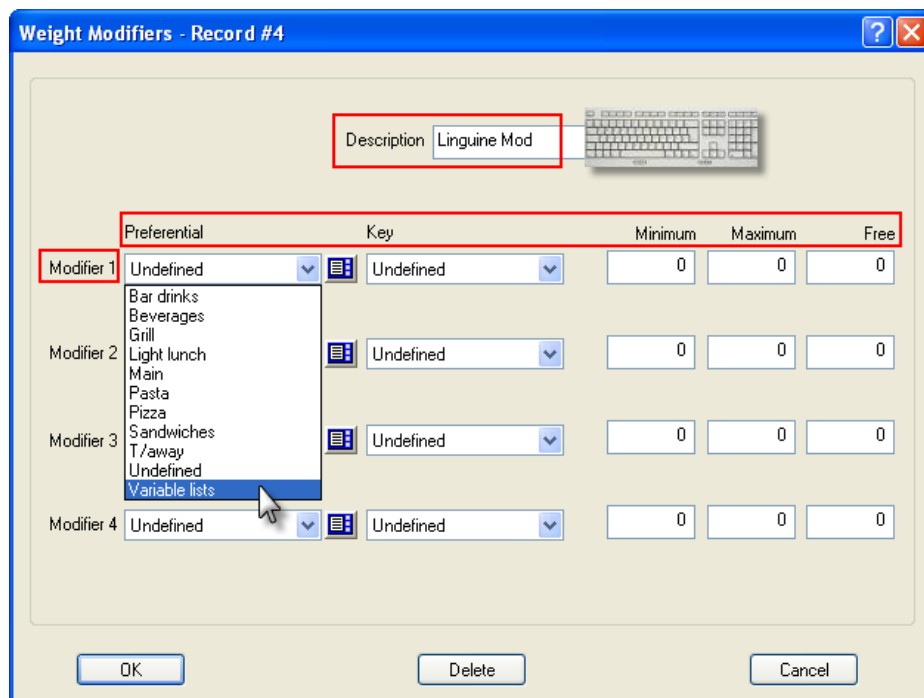


Type in a description

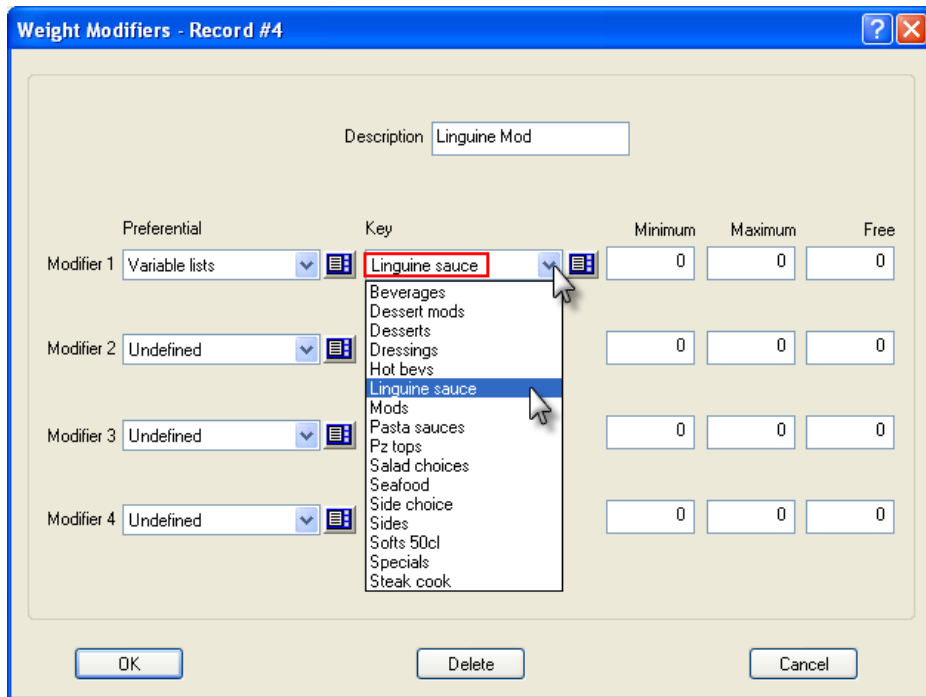
You can have up to 4 Modifier choices.

In our example we will only use Modifier 1.

The first option to set is Preferential – select Variable lists



The second option to set is Key – select the variable list we have created earlier



	Preferential	Key	Minimum	Maximum	Free
Modifier 1	Variable lists	Linguine sauce	0	0	0
Modifier 2	Undefined		0	0	0
Modifier 3	Undefined		0	0	0
Modifier 4	Undefined		0	0	0

The options **Minimum** and **Maximum** are used in order to force a certain number of choices – in the example below we force a minimum of 1 and a maximum of 1.

Free can be used if the modifier is priced – however if the modifier is free leave at zero.

Click on **OK** to Close

Weight Modifiers - Record #4

Description:

	Preferential	Key	Minimum	Maximum	Free
Modifier 1	Variable lists	Linguine sauce	1	1	0
Modifier 2	Undefined	Undefined	0	0	0
Modifier 3	Undefined	Undefined	0	0	0
Modifier 4	Undefined	Undefined	0	0	0

Click on Close

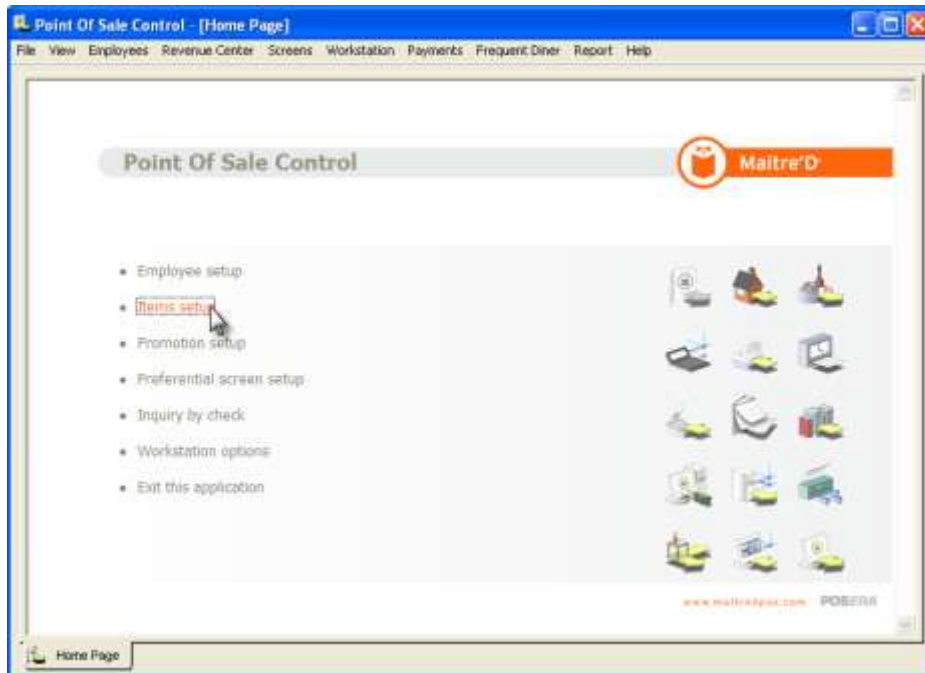
Weighed modifiers

Description	Id
Steak cook	000001
Dressings	000002
Pz toppings	000003
Coffee mod	000004
Dessert mod	000005
Linguine mod	000006

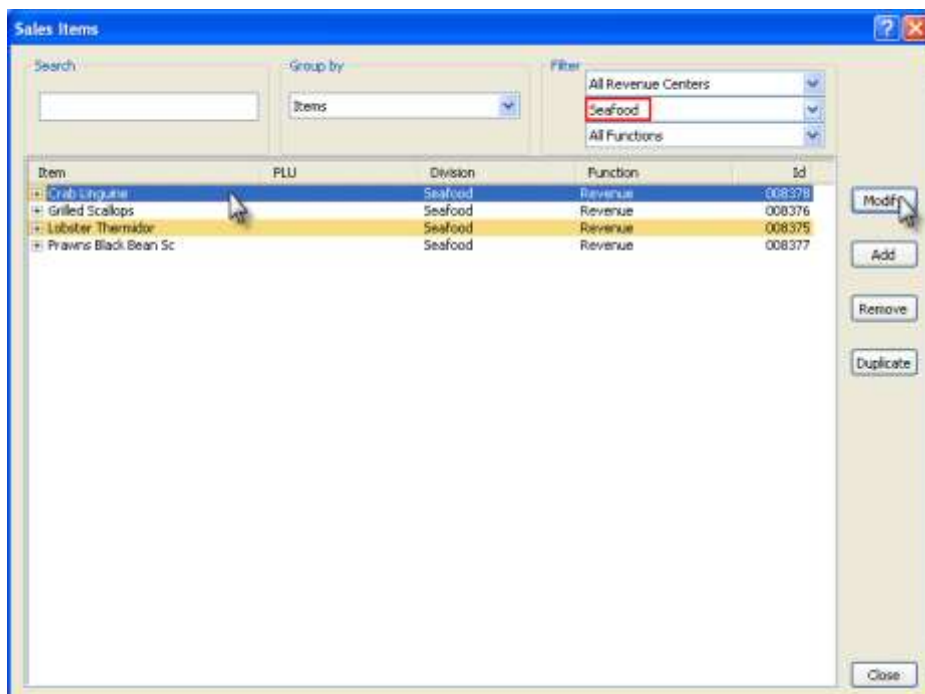
The weight modifier has been created and configured. The final step is to link the sales item to the weight modifier.



Click on **Items Set up**

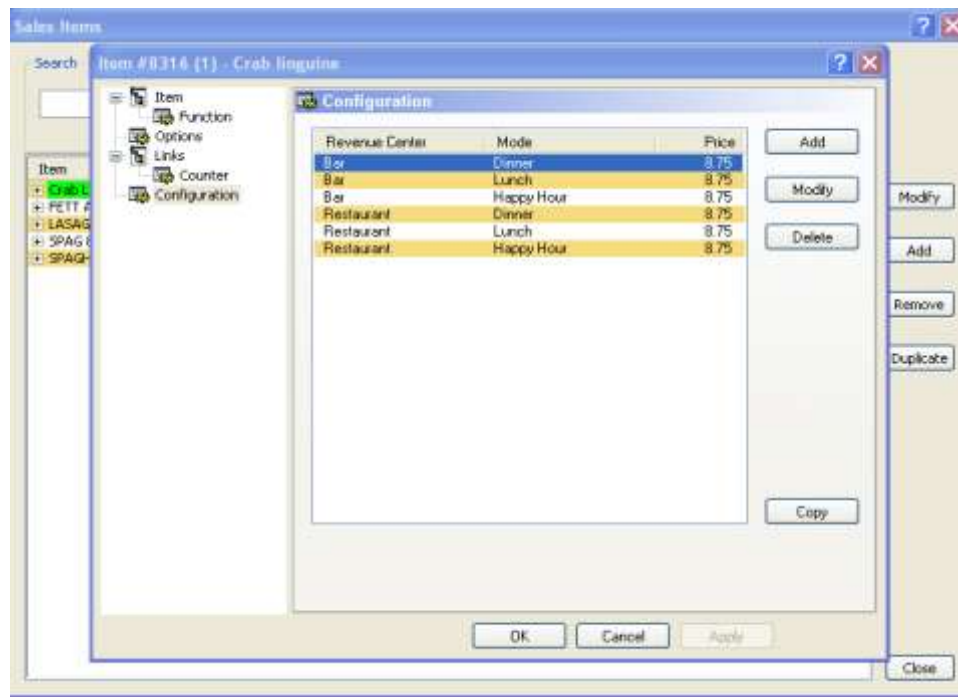


Double click on the sales item or click once and click on **Modify**

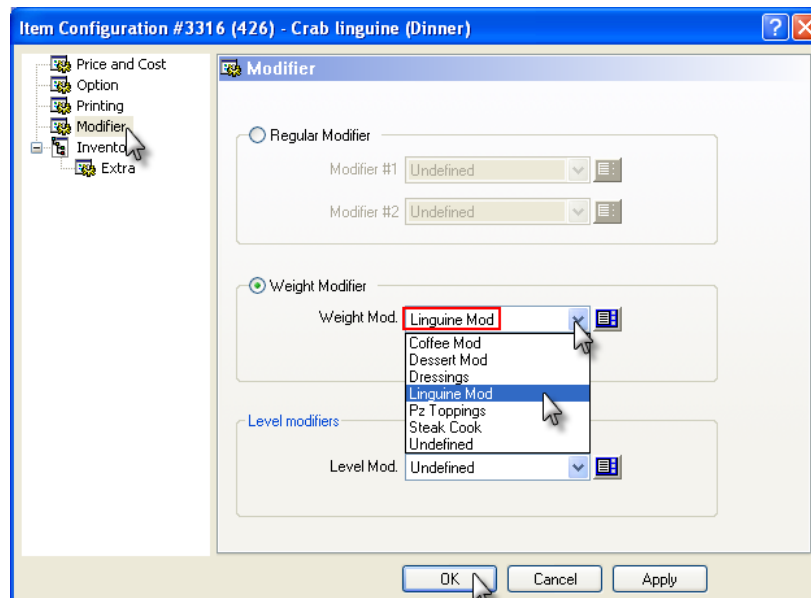




Click on Configuration and double click on the first revenue center and mode – or click once and click on Modify

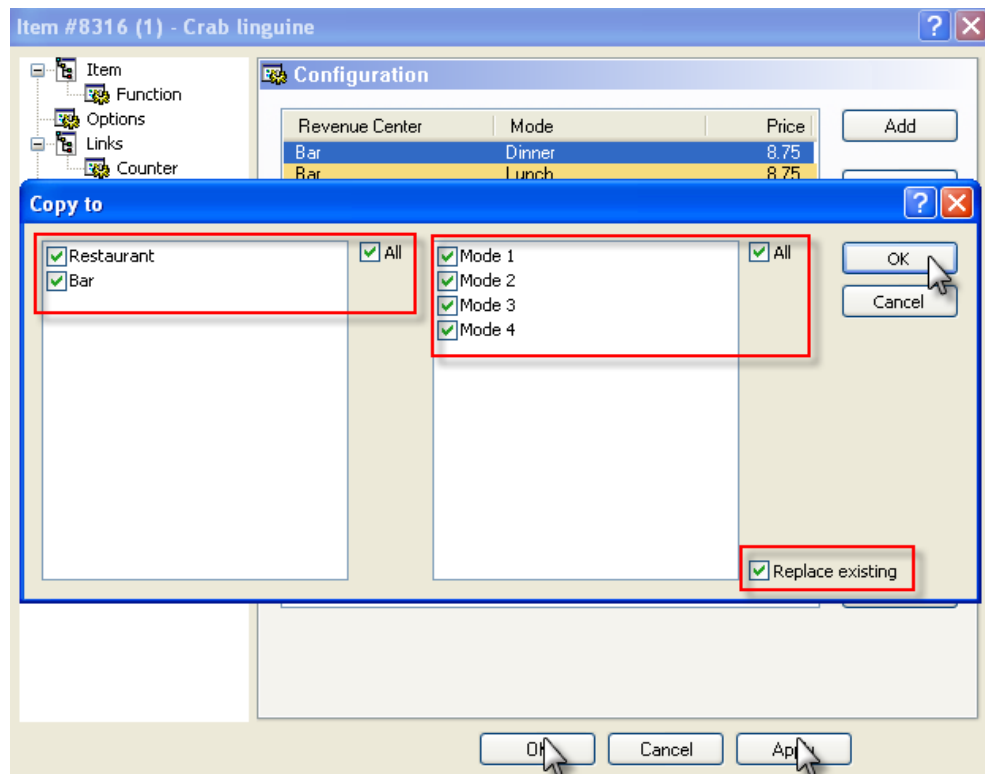


**Click on Modifier and select the Linguine Mod.
Click on OK**

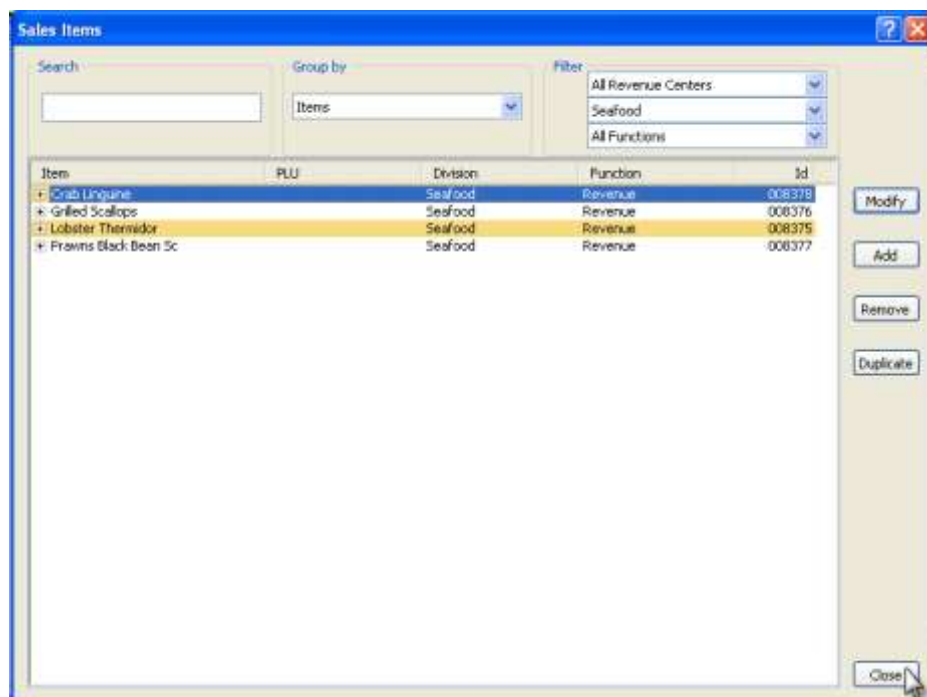


Don't forget to copy to the other revenue centers and modes and to select Replace existing.

Click on Apply and OK to close



Click on Close





How does it work on the POS?

Select Seafood



Select Crab Linguine



Weight modifier choice – you MUST select an option (because the minimum in the weight modifier is set to 1.)

If you click on Cancel – the sales item is cancelled.

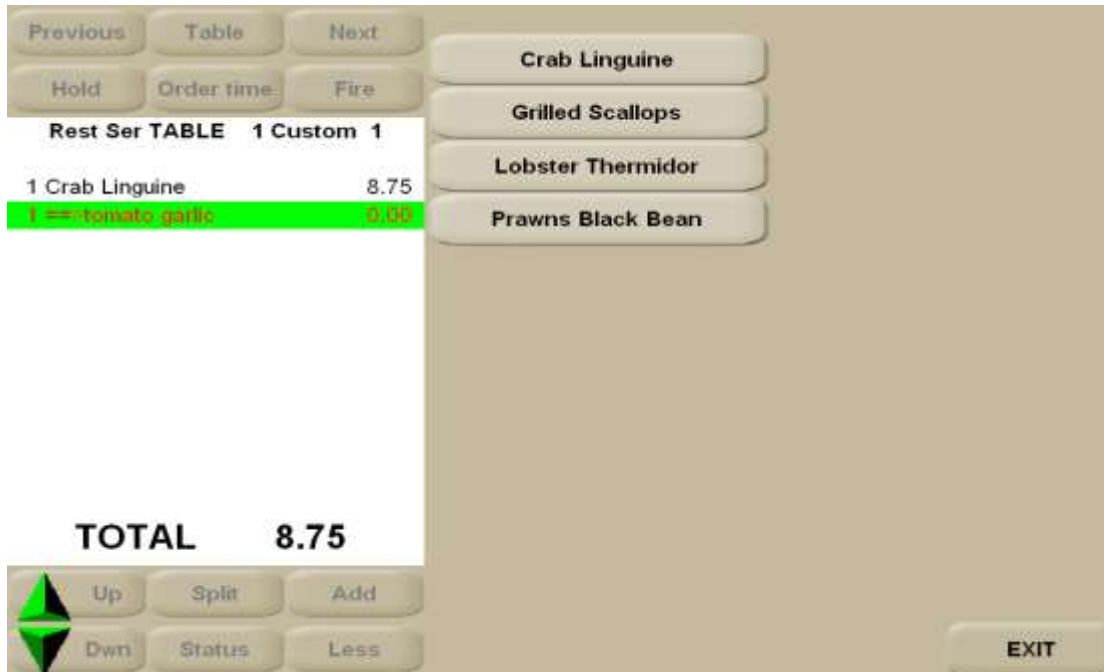


Select one of the options



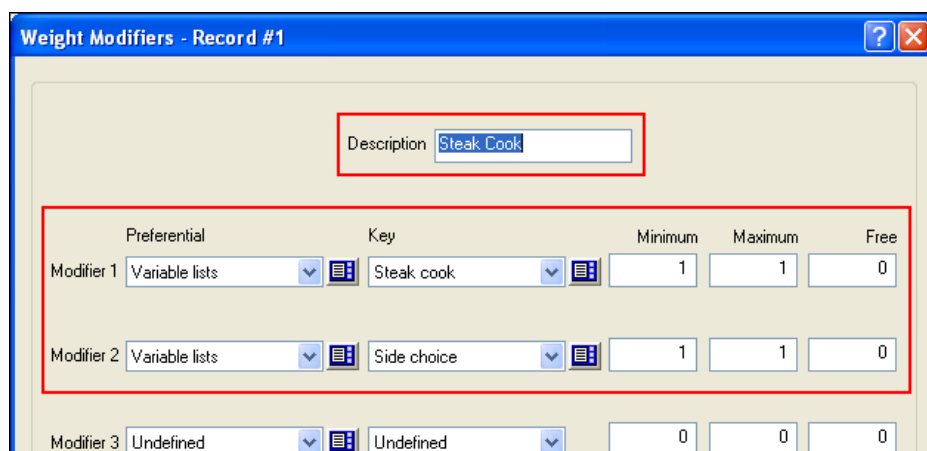


The screen comes back to the seafood list selection (because the maximum in the weight modifier is set to 1.)



See examples below of other weight modifiers configurations.

2 modifiers are required for the Steak Cook – the first will bring the cooking options and the second the choice of side dish.
Setting Min and Max to 1 will force a choice of a cooking option and a side dish.
This information will print on the kitchen printer.

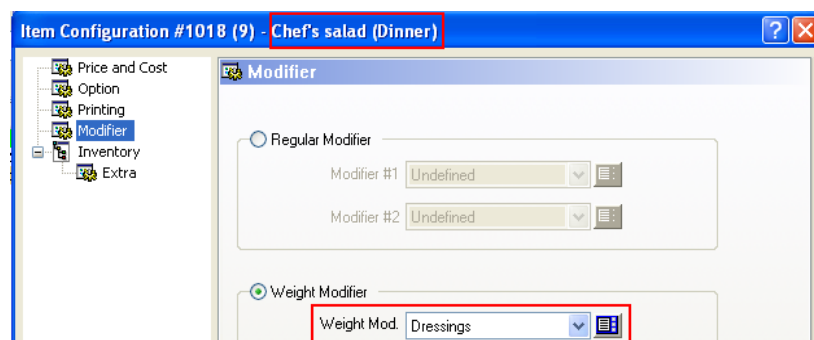
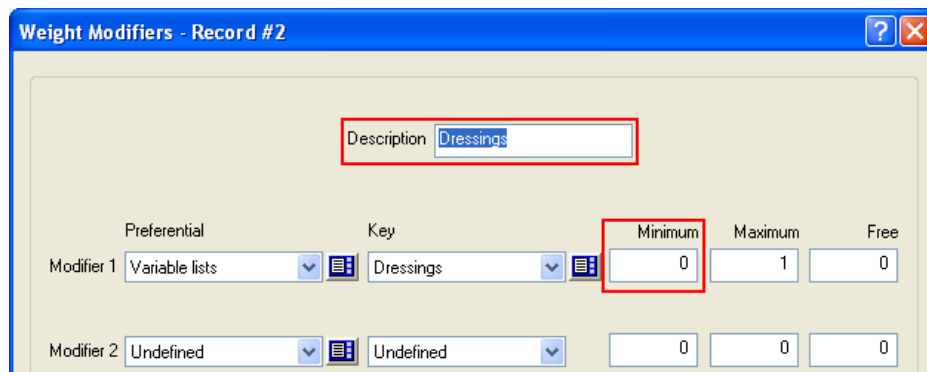






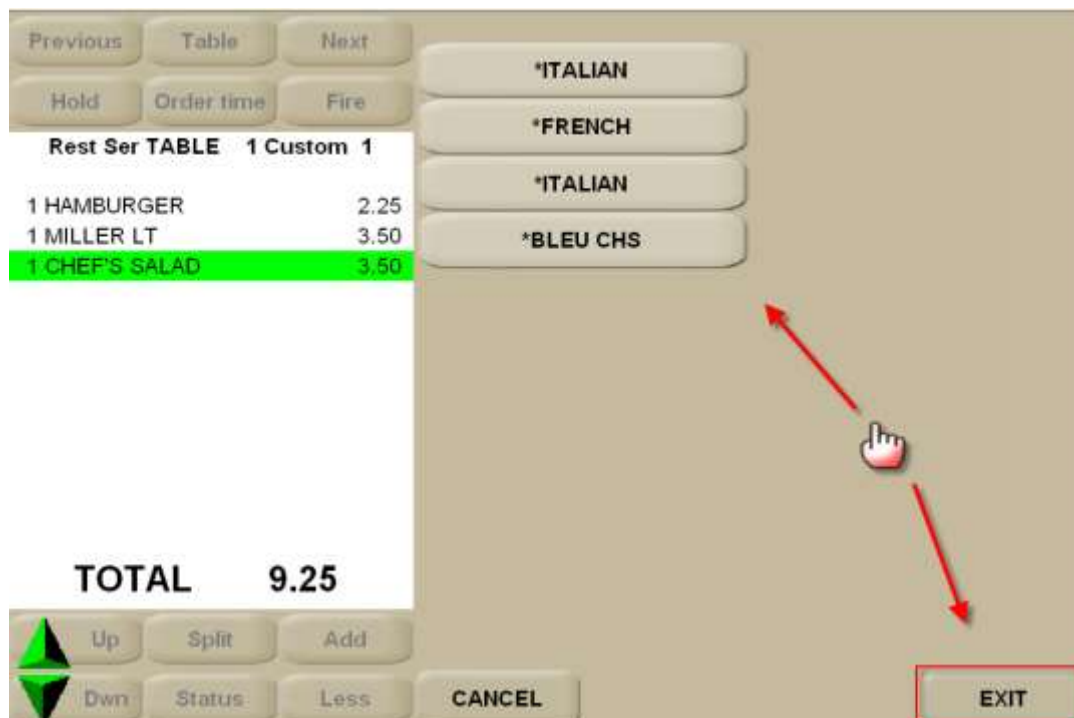
Another example of a weight modifier configuration is to set the Min to 0 – it will enable you to Exit without choosing an option.

This is useful if the sales item does not necessarily require printing on the kitchen check with a remark (unlike the steak which will always need to print with the cooking option).





The choice of dressings displays on the screen but the option Exit is also available (in case of no dressing).

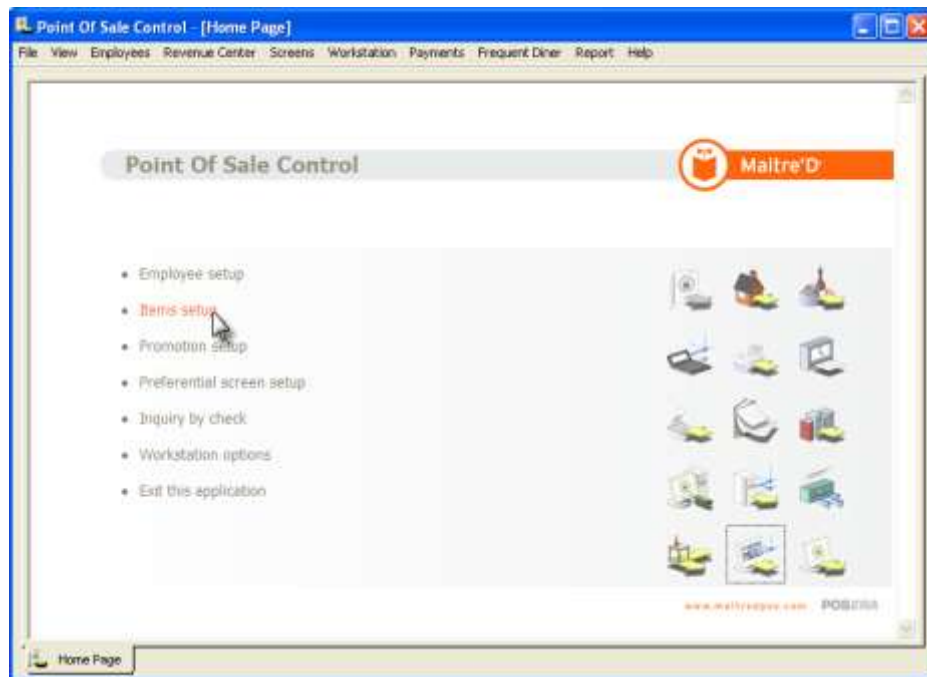


With weight modifiers, the end user has all the necessary options at their disposal to make sure orders are sent to the kitchen with all the relevant information.

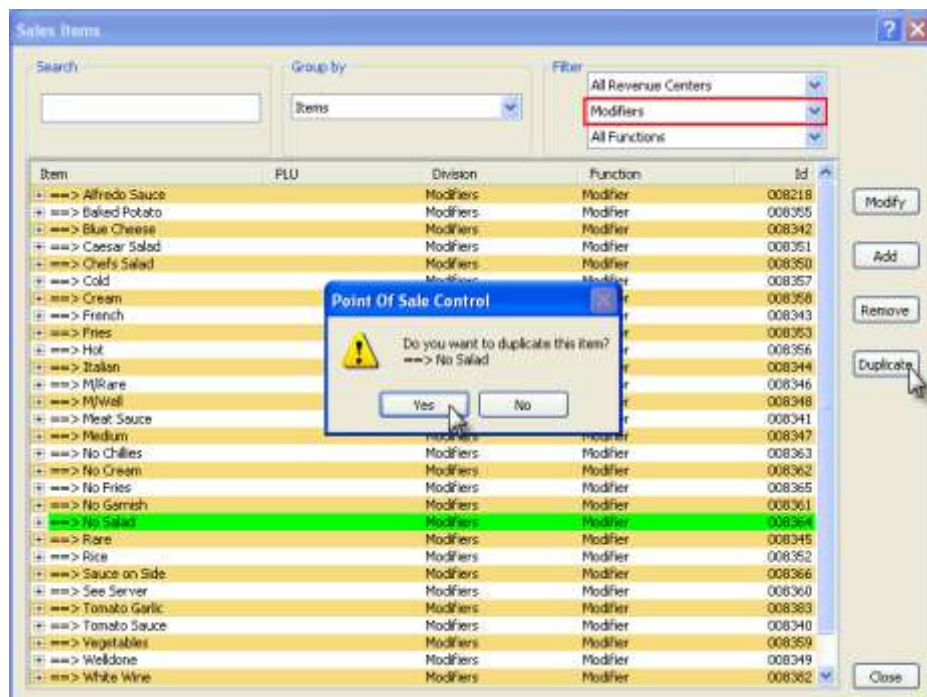


Let's briefly look at more generic modifiers.

Click on **Item Set up**

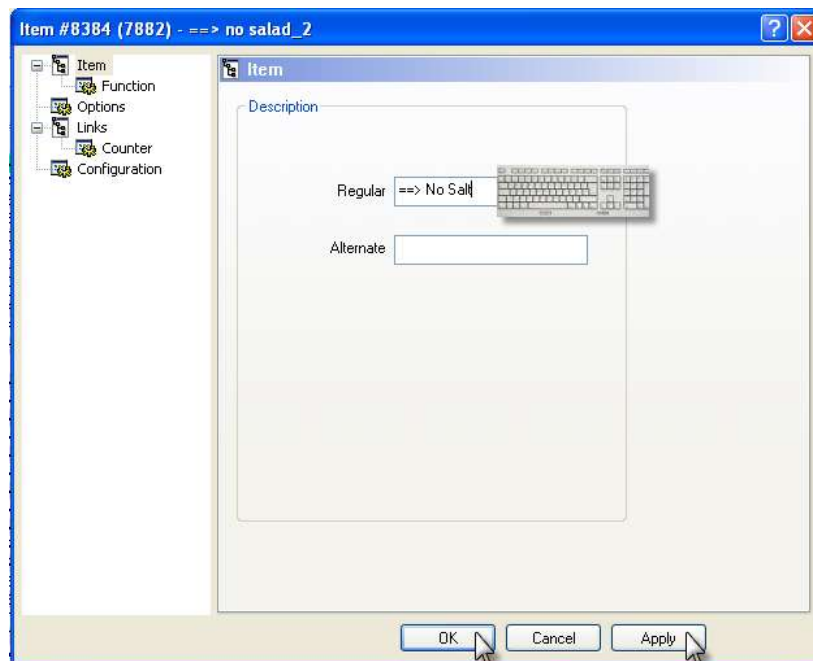


Duplicate and click on Yes

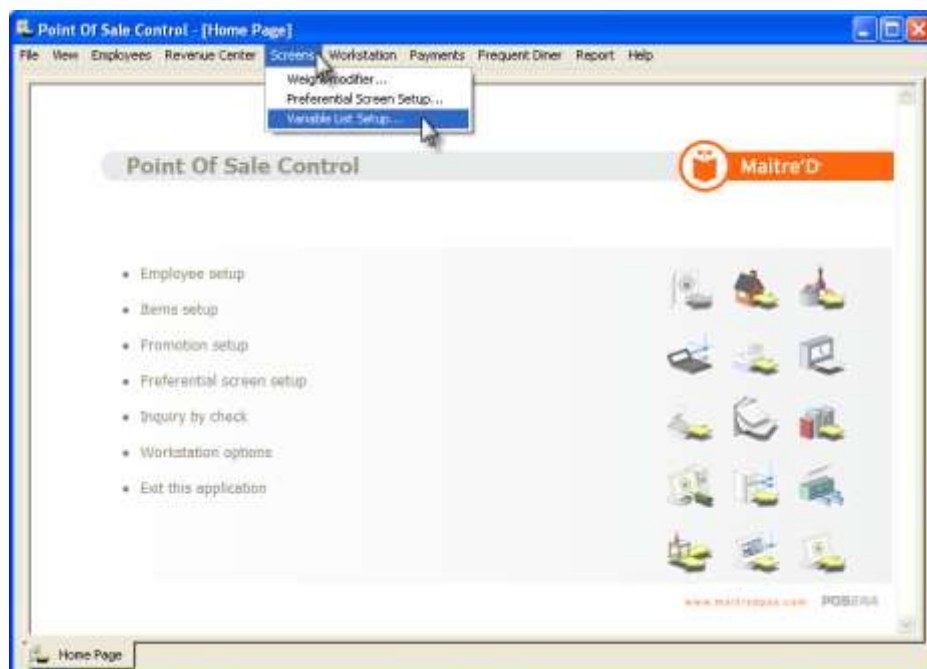


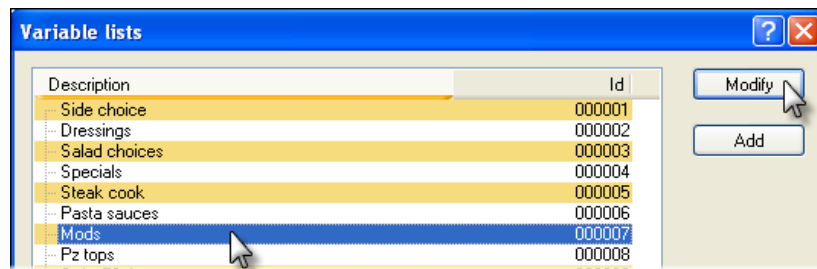


Type description and click on Apply and OK

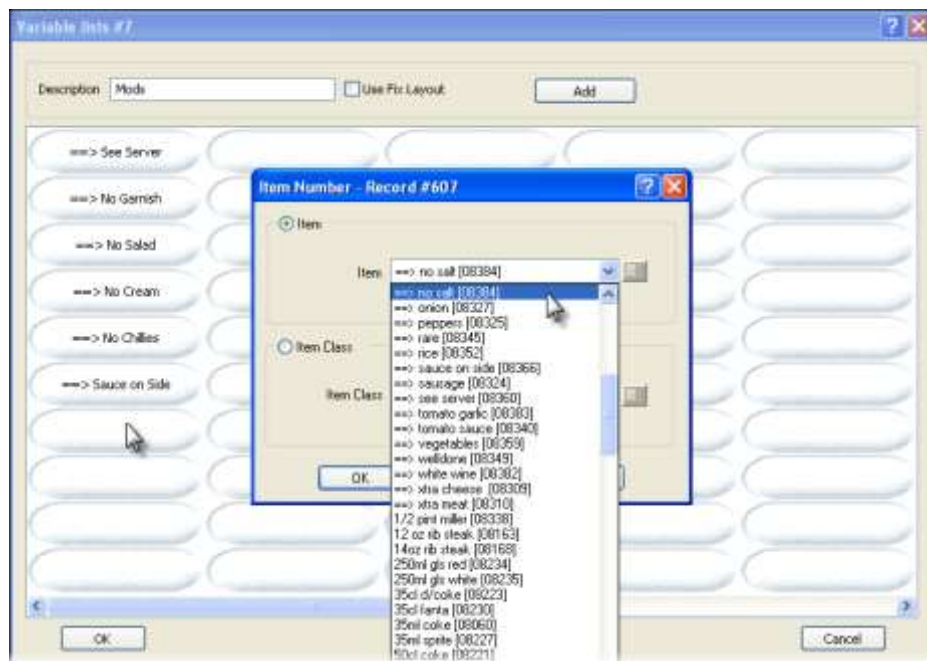


Click on [Screens](#), [Variable List Setup](#) and double click on [Mods](#) or click once and click on [Modify](#)

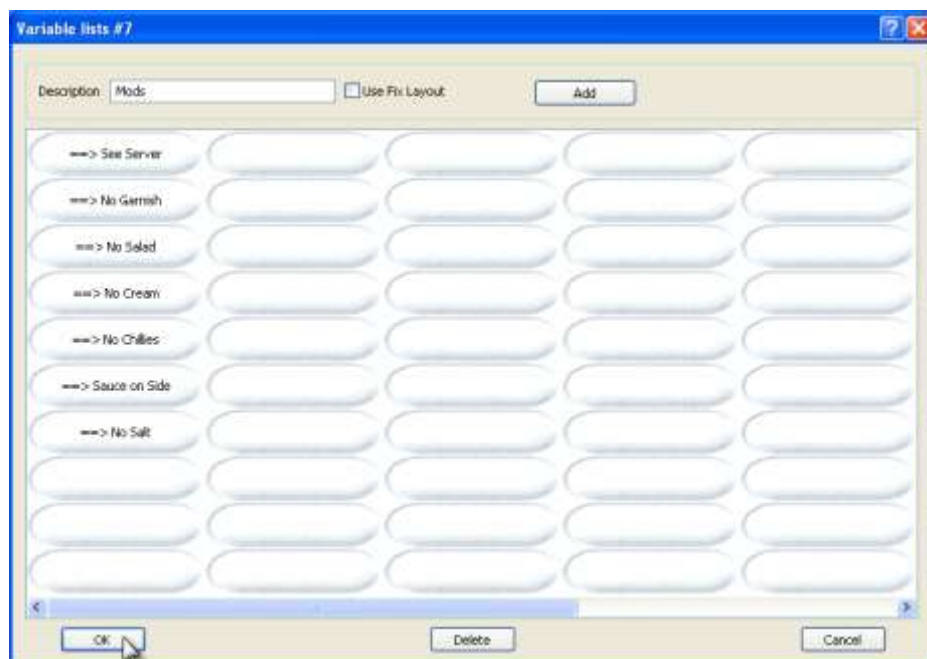




Add the modifier to the list



Click on OK to close the list





These generic remarks are not linked to weight modifiers but are selected from the POS screen whenever they are required.

Select MODS





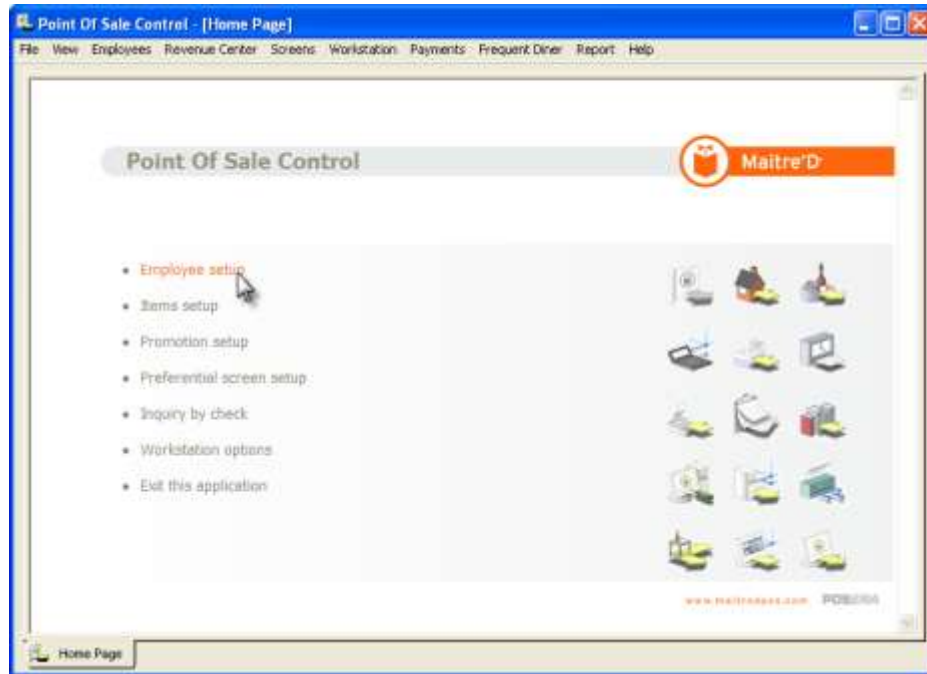
Remember modifiers and weight modifiers are an essential part of the ordering process. Most weight modifiers and generic modifiers have already been configured on your system but the list might not be exhaustive and you may have to add new modifiers at a later stage.

Following the steps above will help you, but should you have any doubts please contact your **Maitre'D consultant.**

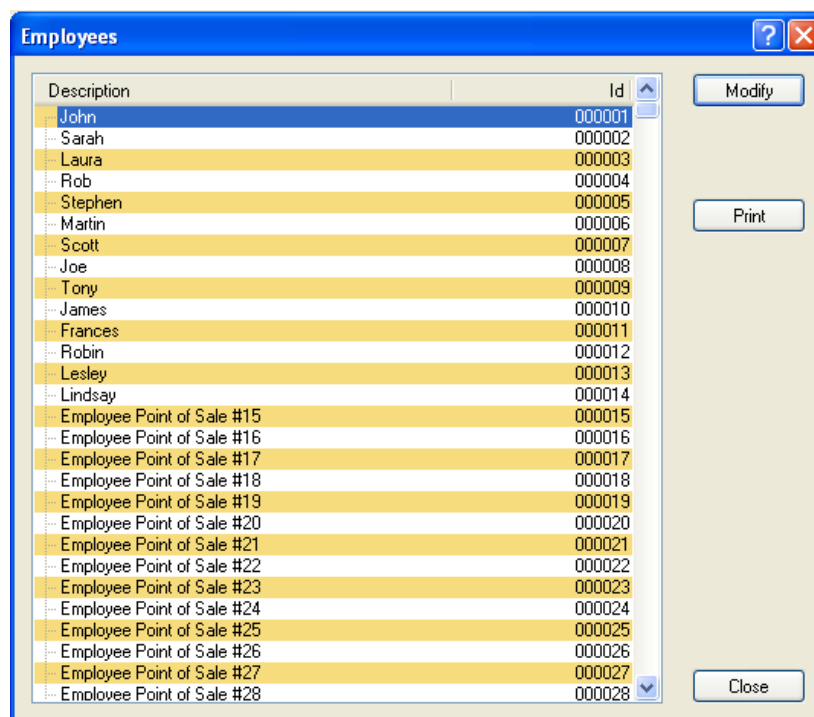


Employee Setup and Configuration

From the back office select **Point of Sale Control**
Click on **Employee setup**



Below is a list of employees – the system can manage up to 900 employees.

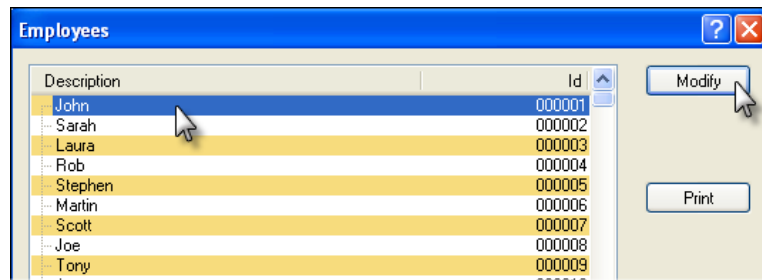




The employee list in your system has already been programmed but you will need to maintain it by adding new employees etc...

Let's examine the different options available with employees – such as managers, supervisors and staff.

Double click on John or click once and click on Modify



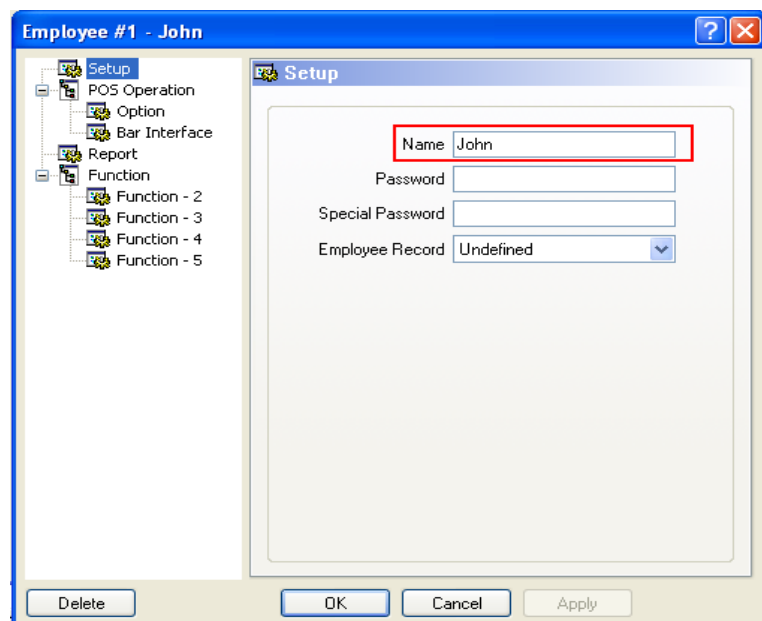
In the first option – Setup – the employee name is entered. This could be the first name or the full name.

⚠ Remember, the name of the employee who has served the customer prints on the guest check!

Password and special password can be entered manually. Passwords can contain up to 5 digits. Passwords are for added protection when an employee logs on to the workstation and special passwords for added protection when using the function menu, for example readings etc.

If you are using employee swipe cards the fields will contain the codes associated with the employee's swipe card.

Employee Record is linked to the Time and Attendance module and is explained in a separate guide.





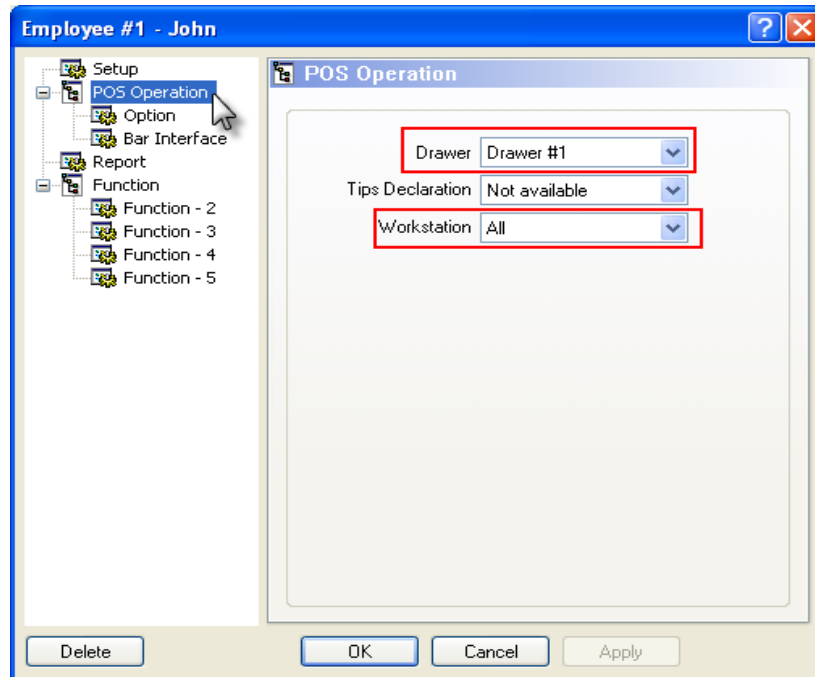
Click on POS Operation

Drawer is set to Drawer #1 – this refers to the cash drawer linked to the POS.

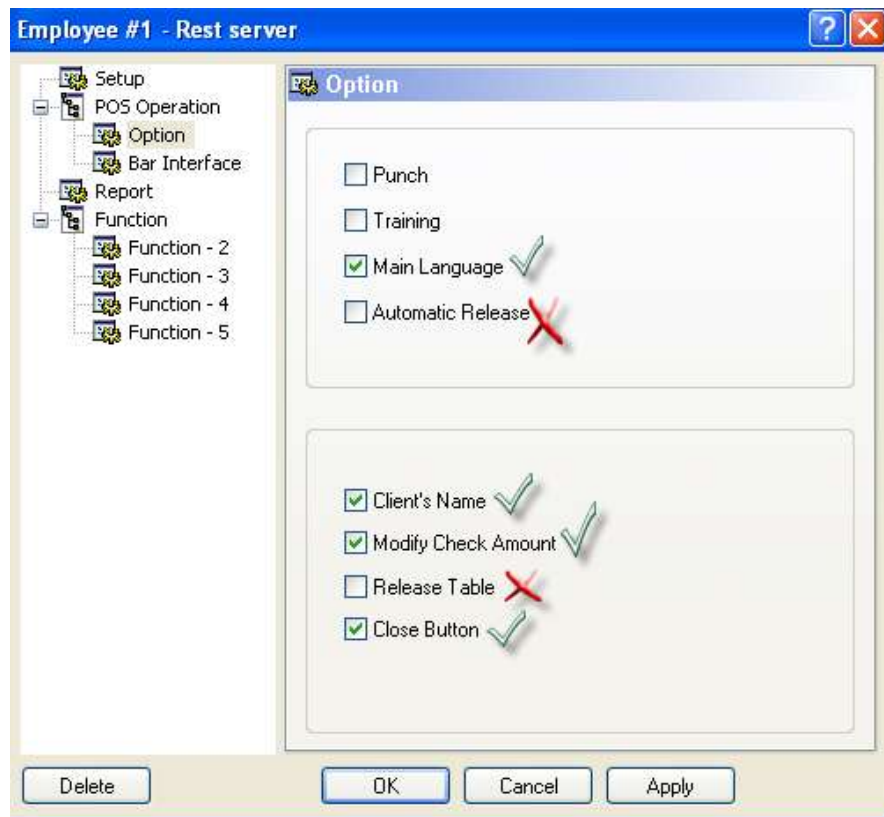
Tips Declaration is not used

Workstation is set to All – it will enable the employee to work on all the POS but could be set to restrict the employee to work only on POS1 for example.

This option is seldom used and we recommend you contact your **Maitre'D consultant before using it.**



Click on Option (explanations for the options below appear on the next page)



Punch is linked to Time and Attendance and is explained in a separate guide.

Enable the Training option for transactions entered by this employee not to affect your sales.

⚠ About Training: when new employees start it is useful to enable the Training option – but **DO NOT** forget to disable it when the training is complete.

Main Language displays POS screens messages in the main language selected in the general configuration. It **MUST be enabled – otherwise the POS screen messages would display in another language (either French or Spanish).**

Automatic Release and Release Table are two options very seldom used and are only for very specific set ups. **DO NOT ENABLE EITHER OF THESE OPTIONS.**

Clients Name allows the employee to open a table using the client's name instead of using a table number – useful for bartender operations.

Modify Check Amount is only used in conjunction with a credit card interface. This option allows the server to change Form of Payment.

Close Button option displays the Close button to this employee at the bottom left of the workstation screen and lists the open and printed checks of this employee.

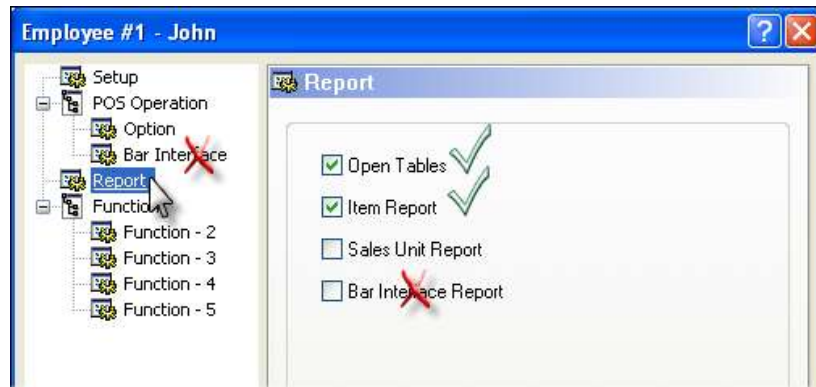
Click on Report – (Bar interface is not used).



Open Tables allows servers to print their financial reports with open tables.

Item Report will compile the items sold by this employee in the Item by server report.

Sales Unit Report is used with counters – contact your **Maitre'D consultant about this option if you are using sales units**



Click on Function

Type in the key description you want this employee to see after entering their POS employee number or swiping their server cards. For example, TABLE NO for a table service employee.

Function – there are 12 employee functions available. These functions are already in the system and cannot be modified.

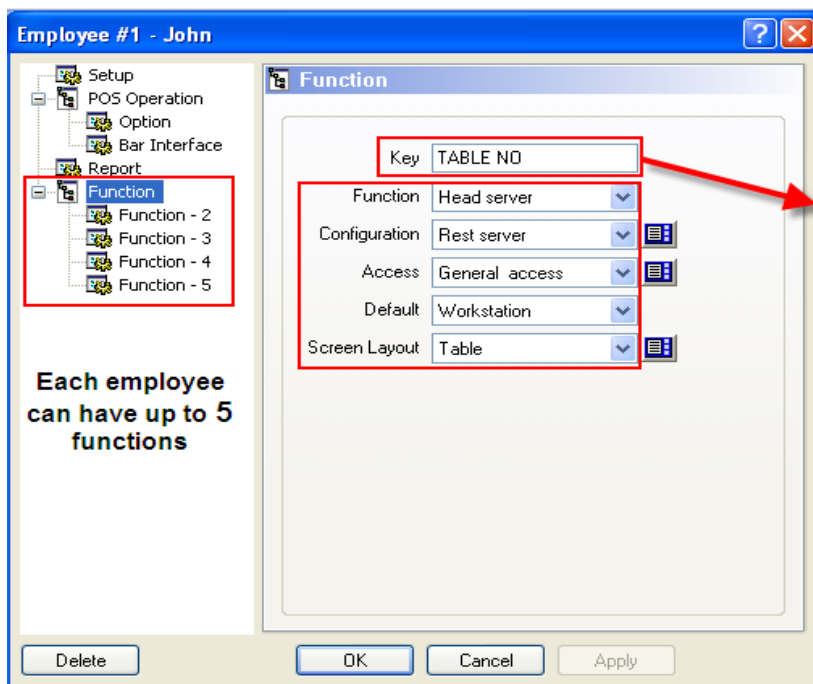
⚠ The functions selected must not be changed without contacting your **Maitre'D consultant first. You risk disabling functionalities on the POS for this employee!!**

The Configuration option is used to select the appropriate rights for voids, promotions and printing etc... These configurations have already been set up but can be modified by your **Maitre'D consultant should you wish to restrict / un-restrict certain commands and functions.**

Access enables a selection of preferential screens to be available when pressing this key. This is set up by your **Maitre'D consultant and should not be changed.**

Default defines where to allocate the sales generated under this key. In this example the workstation manages where to allocate revenue.

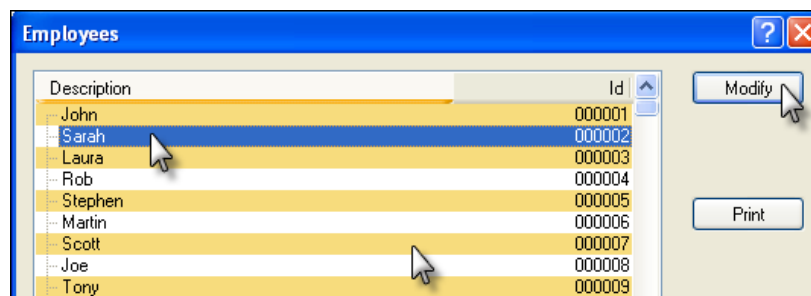
Screen Layout displays the appropriate screen layout for this function.



Options above should only be modified with the help of your **Maitre'D** consultant.

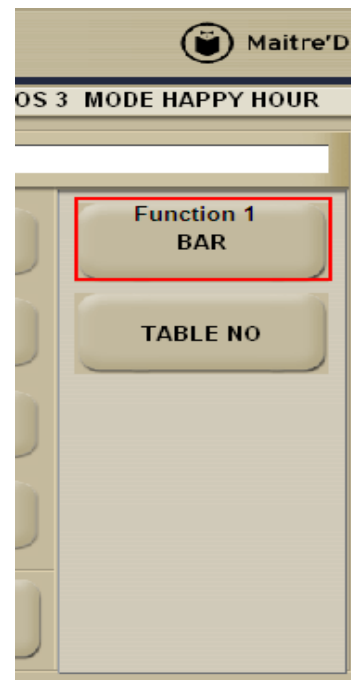
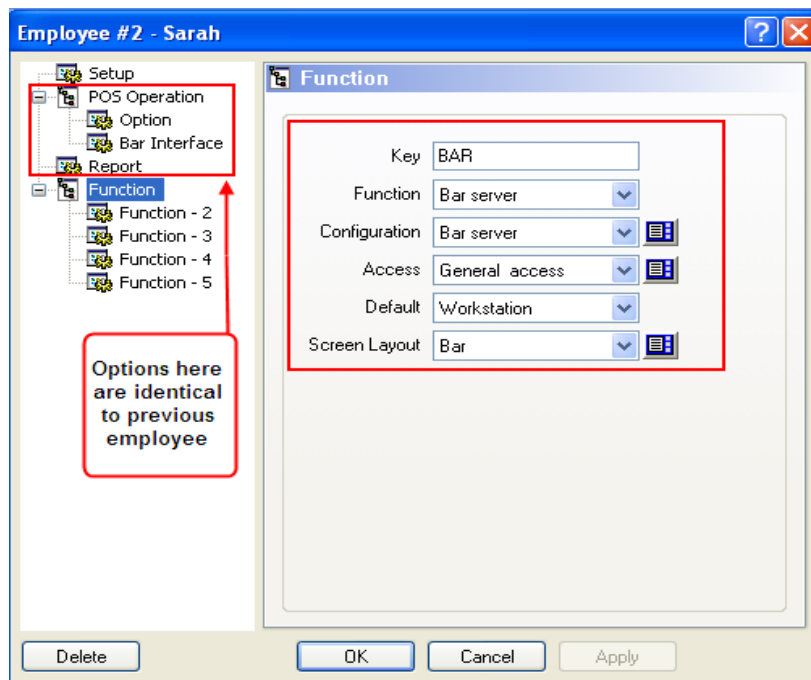
Click on OK to close

Double click on Sarah or click once and click on Modify

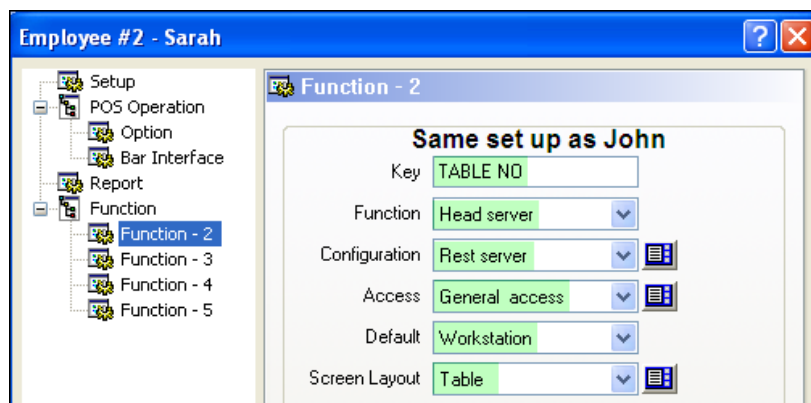


This employee has two functions.

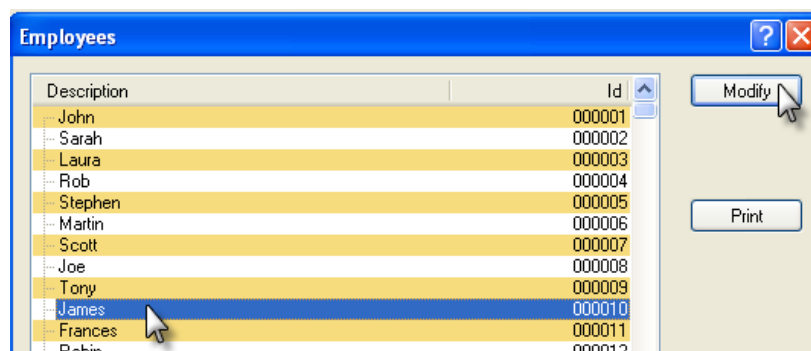
See below:



The second function



Double Click on James (Manager) or click once and click on Modify



This employee has 3 functions.



See below:

Employee #10 - James

- Setup
 - POS Operation
 - Option
 - Bar Interface
 - Report
- Function
 - Function - 2
 - Function - 3
 - Function - 4
 - Function - 5

Options here are identical to previous employees

Function

Similar set up as 2 previous employees but **CONFIGURATION** is different

Key: BAR

Function: Bar server

Configuration: Manager

Access: General access

Default: Workstation

Screen Layout: Bar

Maitre'D

OS 3 MODE HAPPY HOUR

Function 1
BAR

TABLE NO

MANAGER

The second function

Employee #10 - James

- Setup
 - POS Operation
 - Option
 - Bar Interface
 - Report
- Function
 - Function - 2
 - Function - 3
 - Function - 4
 - Function - 5

Function - 2

Similar set up as 2 previous employees but **CONFIGURATION** is different

Key: TABLE NO

Function: Head server

Configuration: Manager

Access: General access

Default: Workstation

Screen Layout: Table

Maitre'D

OS 3 MODE HAPPY HOUR

BAR

Function 2
TABLE NO

MANAGER

The third function

Employee #10 - James

- Setup
 - POS Operation
 - Option
 - Bar Interface
 - Report
- Function
 - Function - 2
 - Function - 3
 - Function - 4
 - Function - 5

Function - 3

Key: MANAGER

Function: Manager

Configuration: Manager

Access: General access

Default: Workstation

Screen Layout: Manager

Maitre'D

OS 3 MODE HAPPY HOUR

BAR

TABLE NO

Function 3
MANAGER



All the above examples are typical employee set up within a bar and table service environment.

In quick service the fundamentals for setting up employees do not change – the main difference being the Functions assigned to employees. Instead of Bar Server or Head Server the functions Fast Food and / or Order would be used.

There would also be configurations for managers and staff.



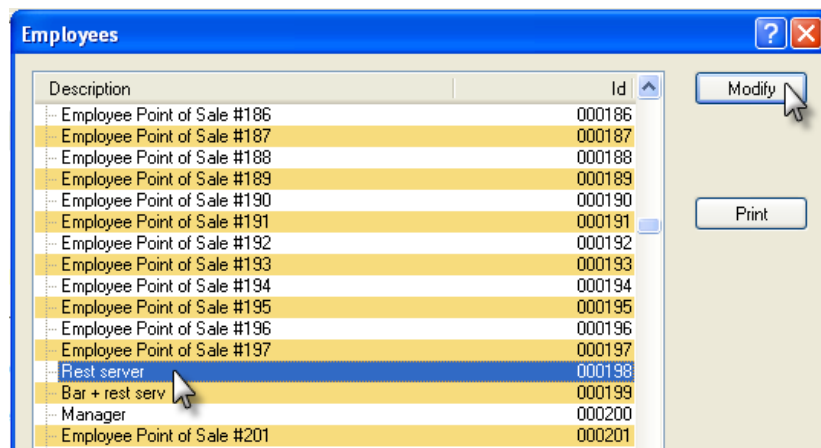
How do I create a new employee?

The easiest way to create a new employee is to copy from an employee template which will have been set up by your **Maitre'D** consultant. These templates are usually named Server template, Bar template, Manager templates etc...and are usually id's 198 199 and 200 depending on the number of templates required by each site.

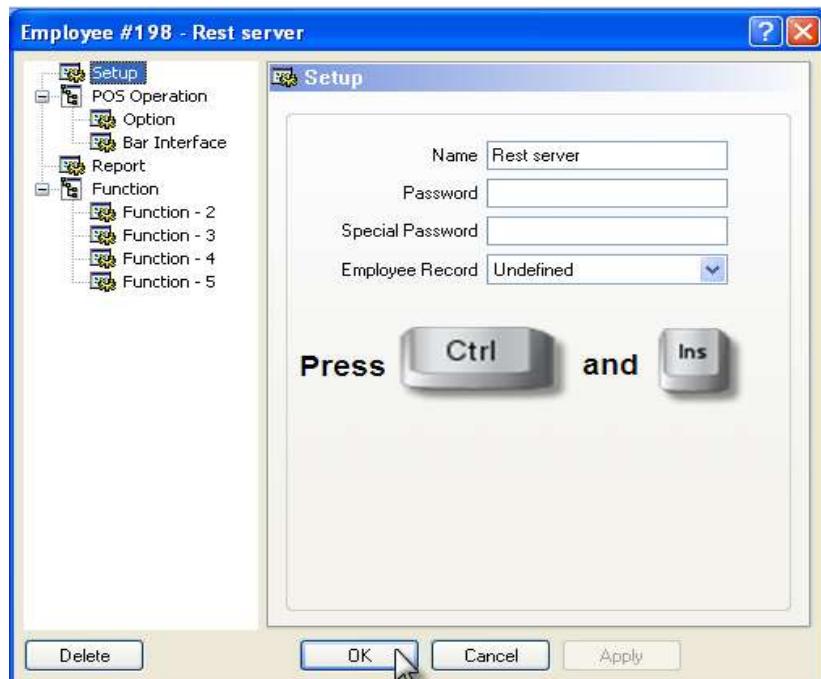
See below:

Description	Id
Employee Point of Sale #186	000186
Employee Point of Sale #187	000187
Employee Point of Sale #188	000188
Employee Point of Sale #189	000189
Employee Point of Sale #190	000190
Employee Point of Sale #191	000191
Employee Point of Sale #192	000192
Employee Point of Sale #193	000193
Employee Point of Sale #194	000194
Employee Point of Sale #195	000195
Employee Point of Sale #196	000196
Employee Point of Sale #197	000197
Rest server	000198
Bar + rest serv	000199
Manager	000200
Employee Point of Sale #201	000201
Employee Point of Sale #202	000202

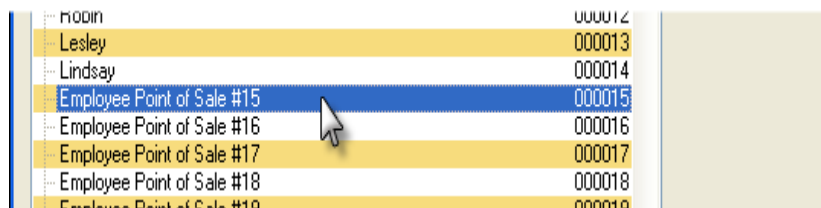
To create a new Restaurant server double click on the template or click once and click on Modify



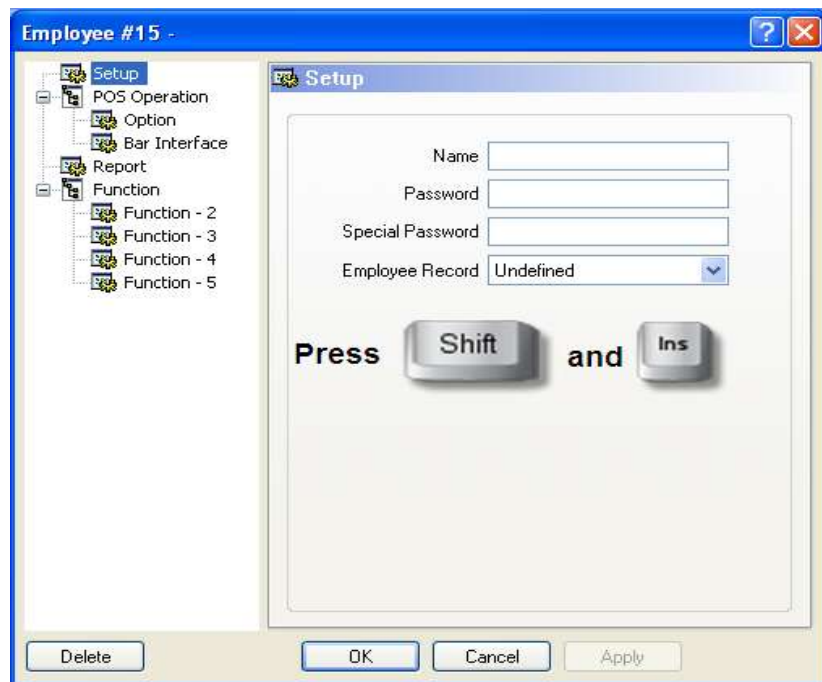
Press the Ctrl and Insert keys on your keyboard
Click on OK



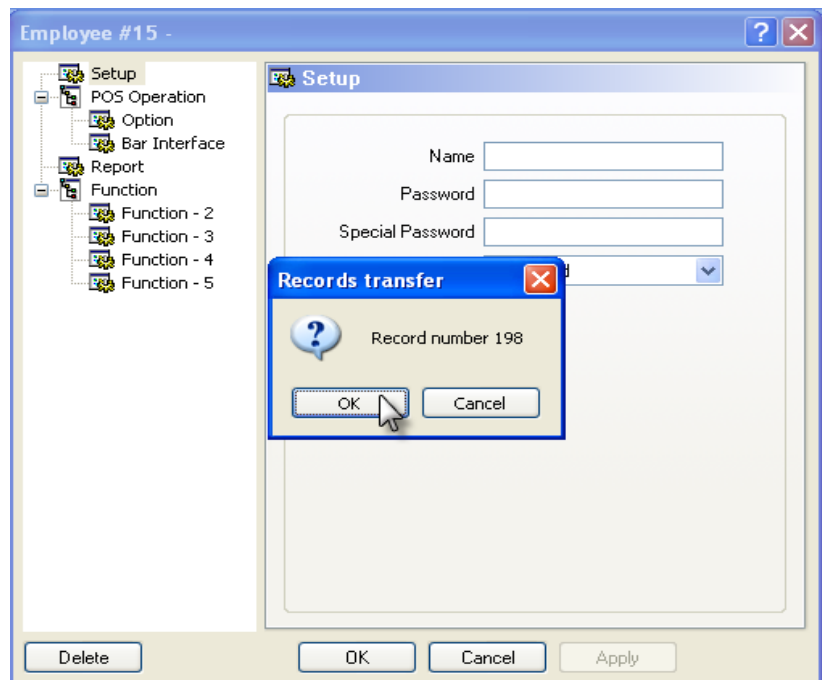
Now double click on the first available employee or click once and click on Modify



Press the Shift and Ins keys on your keyboard



Click on Yes when prompted to copy





**Highlight and type in the server name.
Click on Apply and OK**

The 'Employee #15 - Setup' dialog box is shown. On the left is a tree view with 'Setup' selected, containing sub-items: 'POS Operation', 'Option', 'Bar Interface', 'Report', 'Function', 'Function - 2', 'Function - 3', 'Function - 4', and 'Function - 5'. The main area is titled 'Setup' and contains four fields: 'Name' (with 'Rest server' entered and highlighted), 'Password', 'Special Password', and 'Employee Record' (a dropdown menu showing 'Undefined'). A keyboard icon is positioned over the 'Name' field. At the bottom are buttons for 'Delete', 'OK', 'Cancel', and 'Apply'. A mouse cursor is pointing at the 'Apply' button.

It's done!!

The new employee has the same set up as existing restaurant servers and you do not need to configure the options or functions.

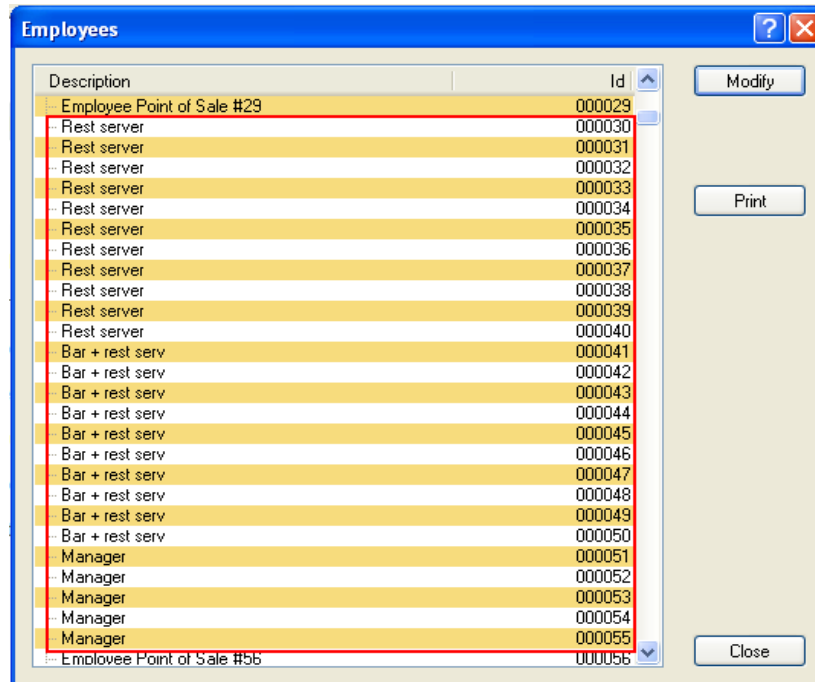
The 'Employees' window displays a list of employees and points of sale. The list has two columns: 'Description' and 'Id'. The 'Id' column has a small upward arrow icon next to it. On the right side of the window are buttons for 'Modify', 'Print', and 'Close'. The list contains 28 entries, with 'David' highlighted in blue.

Description	Id
John	000001
Sarah	000002
Laura	000003
Rob	000004
Stephen	000005
Martin	000006
Scott	000007
Joe	000008
Tony	000009
James	000010
Frances	000011
Robin	000012
Lesley	000013
Lindsay	000014
David	000015
Employee Point of Sale #16	000016
Employee Point of Sale #17	000017
Employee Point of Sale #18	000018
Employee Point of Sale #19	000019
Employee Point of Sale #20	000020
Employee Point of Sale #21	000021
Employee Point of Sale #22	000022
Employee Point of Sale #23	000023
Employee Point of Sale #24	000024
Employee Point of Sale #25	000025
Employee Point of Sale #26	000026
Employee Point of Sale #27	000027
Employee Point of Sale #28	000028



It is possible your **Maitre'D** consultant might also have created a number of employee templates ready for use in addition to the generic ones. In this case just double click relevant template and type the name of new employee as described above.

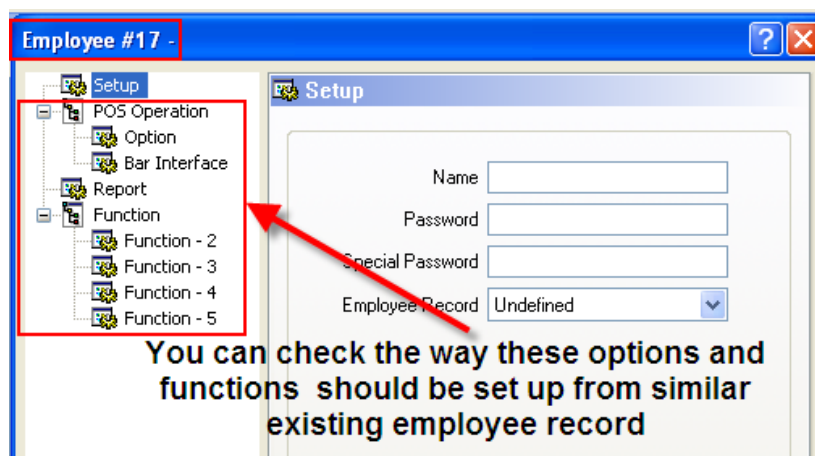
See below:



If you do not have any templates you will need to create new employees by selecting an empty record and making sure all the options and functions are set up properly.



Remember you can always look at existing employee records and check all the options and tabs and replicate the settings on your new employee.



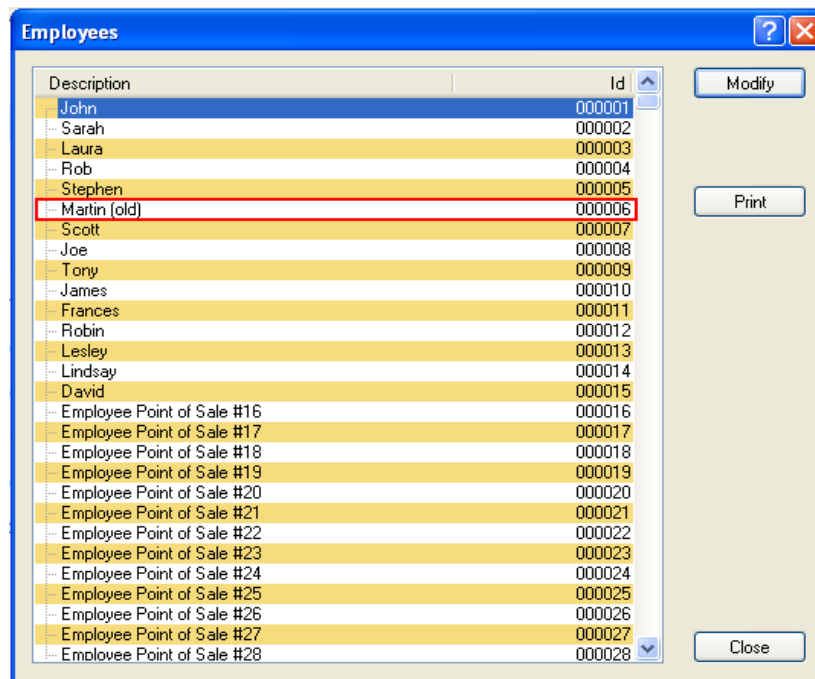
You can check the way these options and functions should be set up from similar existing employee record

It is not recommended to delete or overwrite an employee record.



The correct procedure for terminating employee records is to add a description such as ex or old for example.

See below



What happens if you re-use an existing employee record

The name of the employee will remain in the archive, detailed transactions and historical files on your **Maitre'D** system.

But the sales of the employee will now be attributed to the new employee. So generating employee reports will show sales which do not belong to the new employee.

Example: Employee 9 – Tony worked for 6 months from 1st June to 30th November.
His total sales amount to \$ 20.000

Should you overwrite the name of employee 9 to Jack – new employee – when taking an Item Report by Employee you will have sales of \$ 20.000 between June and December.

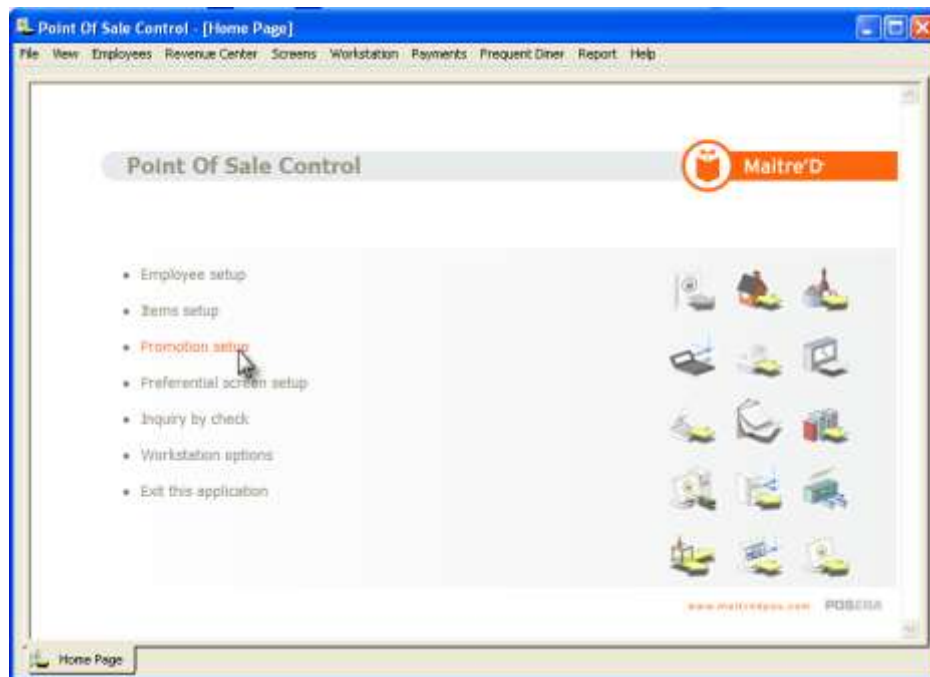
However the archive and historical data of transactions remain as they should under the name of the original employee as these cannot be altered or modified.

There are a total of 900 employees in the system – the likelihood of running out of employees is therefore minimal.

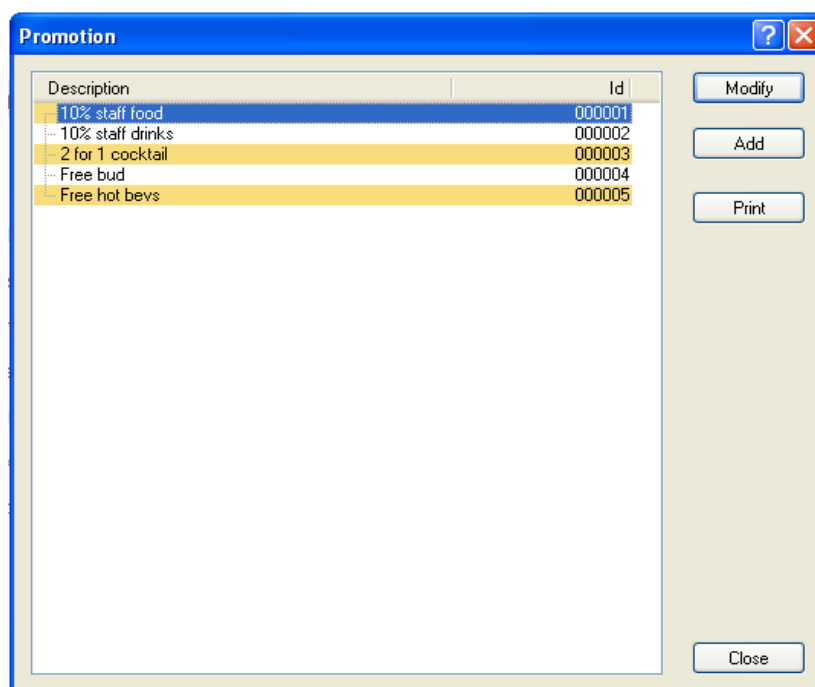


Promotions

From the back office select **Point of Sale Control**
Click on **Promotion Setup**



Below is a list of promotions – there is a maximum of 50 promotions available.

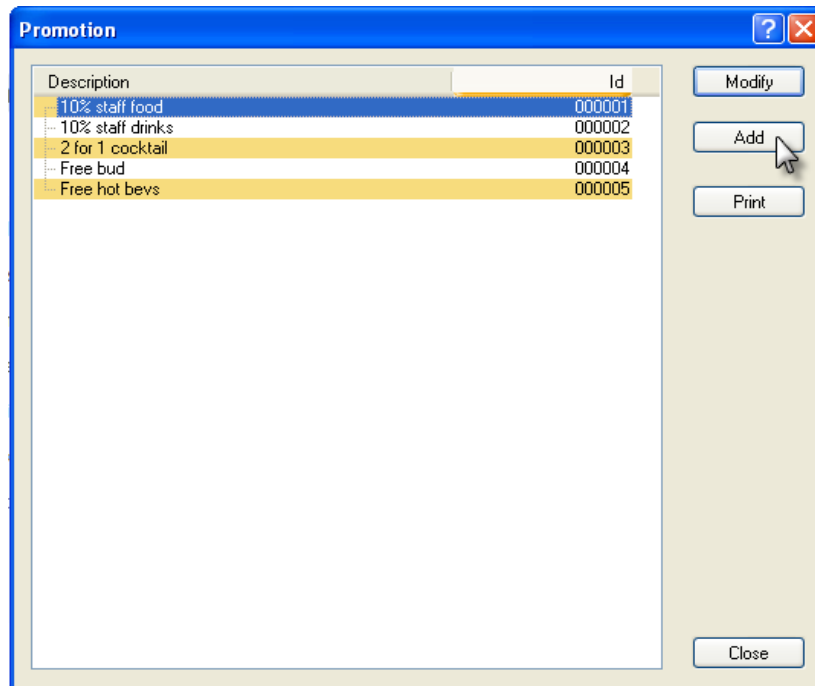


The promotions in your program have already been set up by your **Maitre'D** consultant.

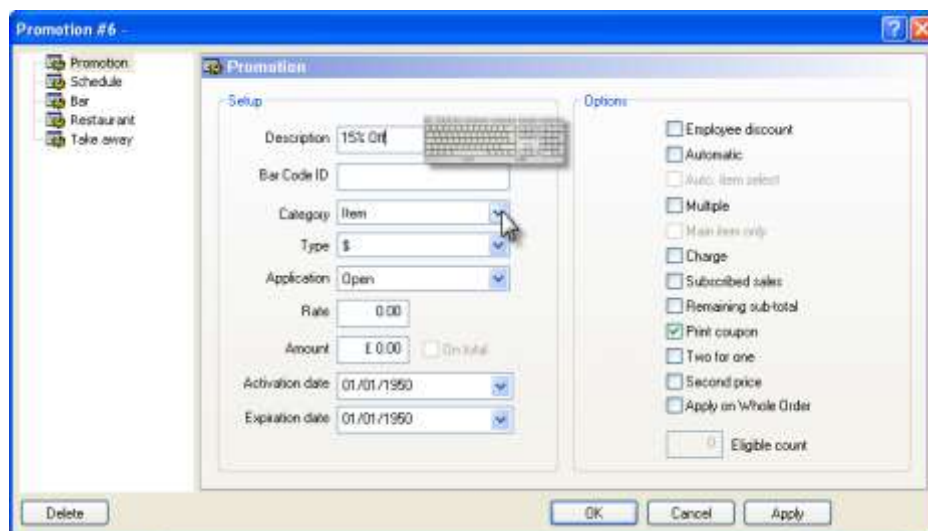


However you may wish to add promotions / discounts yourself. You can add simple promotions such as 15% off the total bill (see example below), but for more complicated promotions such as 2 for 1 or Buy 1 get 1 Free you will need to contact your **Maitre'D** consultant.

Click on Add



Type in a description and click on the Category list to drop down the options.



The drop down menu will give you a list of options to choose from.



The options available for selection will vary in accordance to the existing configurations in your system.

For example, if the tax rate is set to 0.00 (all your reports show gross figures) you will be able to select Gross Sales and Item.

This screenshot shows the "Promotion #6" dialog box with the "Setup" tab selected. The "Description" field contains "15% Off". The "Category" is set to "Item by division". The "Type" dropdown menu is open, showing options: "Credit", "Free amount", "Free on sub-total", "Gross sales", "Item", "Item by division", "Item media/division", "Item media/item", "Maximum on sub-total", "Maximum on total", "Privilege card", and "Sub-total". The "Application" field is set to "Item". The "Rate" field is empty. The "Amount" field is set to "£ 0.00". The "Activation date" and "Expiration date" are both set to "01/01/1950". The "Options" tab on the right contains several checkboxes: "Employee discount", "Automatic", "Auto item select", "Multiple", "Main item only", "Charge", "Subscribed sales", "Remaining sub-total", "Print coupon" (checked), "Two for one", "Second price", "Apply on Whole Order", and "Eligible count".

Click on Type and select either \$ (amount) or % (percentage)

This screenshot shows the "Promotion #6" dialog box with the "Setup" tab selected. The "Description" field contains "15% Off". The "Category" is set to "Item by division". The "Type" dropdown menu is open, showing options: "Credit", "Free amount", "Free on sub-total", "Gross sales", "Item", "Item by division", "Item media/division", "Item media/item", "Maximum on sub-total", "Maximum on total", "Privilege card", and "Sub-total". The "Application" field is set to "Item". The "Rate" field is set to "0.00". The "Amount" field is set to "£ 0.00" and the "On total" checkbox is checked. The "Activation date" and "Expiration date" are both set to "01/01/1950". The "Options" tab on the right contains several checkboxes: "Employee discount", "Automatic", "Auto item select", "Multiple", "Main item only", "Charge", "Subscribed sales", "Remaining sub-total", "Print coupon" (checked), "Two for one", "Second price", "Apply on Whole Order", and "Eligible count".



Select the application – Fix or Open

Enter the rate (for percentage) or the amount (for \$).

The On Total option is not used.

For Activation date you can set a date from which your promotion will become available.

For Expiration date you can set a date at which your promotion will cease to be available.

NB: Leaving the dates to the default (below) sets the promotion available indefinitely.

Circled below are options which may require to be enabled.



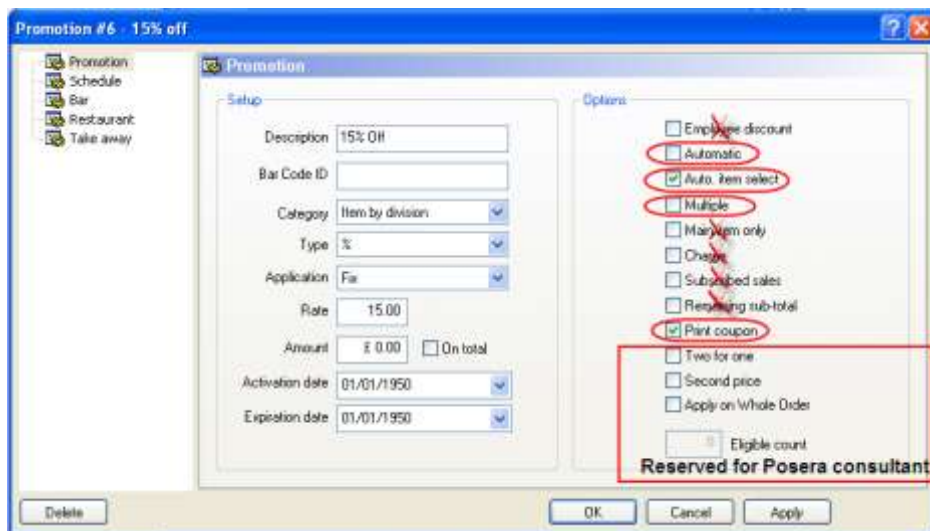
Select Automatic to automatically apply a discount whenever you print a check.

The Auto item select option is only used when Item by Division is also selected. It will automatically select all discountable items, bypassing the item selection on the workstation.

This option is often used for percentage discounts on the check total.

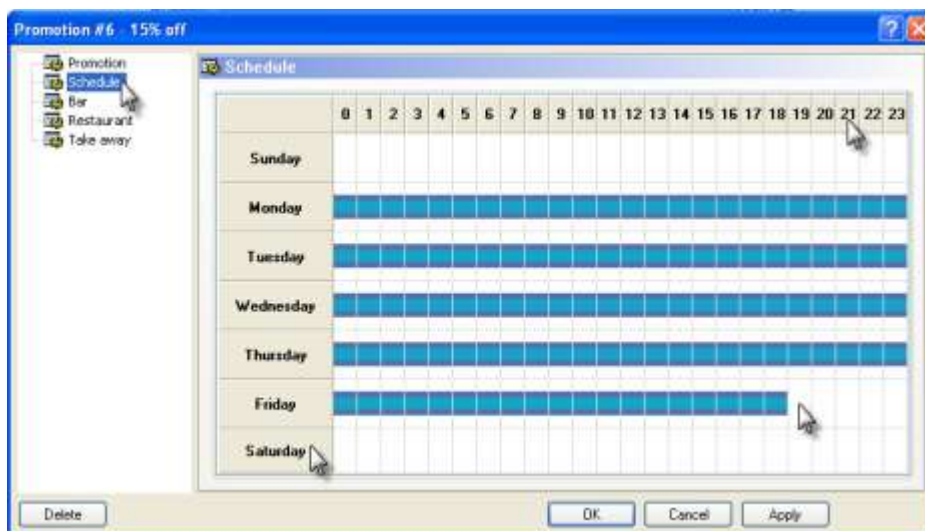
Select Multiple to use the discount in conjunction with other discounts.

Select Print Coupon to print a receipt each time this discount is applied.



Click on Schedule

Select the days and times of discount availability by clicking on relevant squares, days or hours.



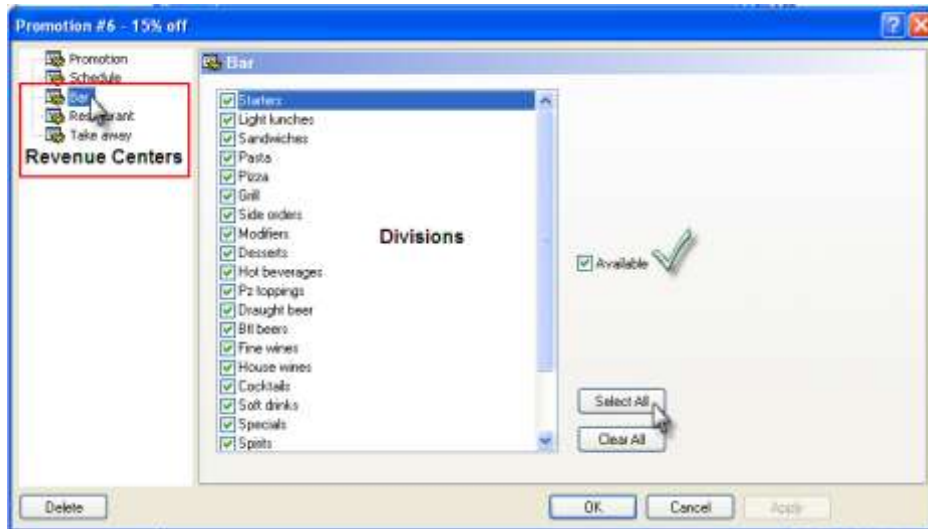
Click on the first revenue center.



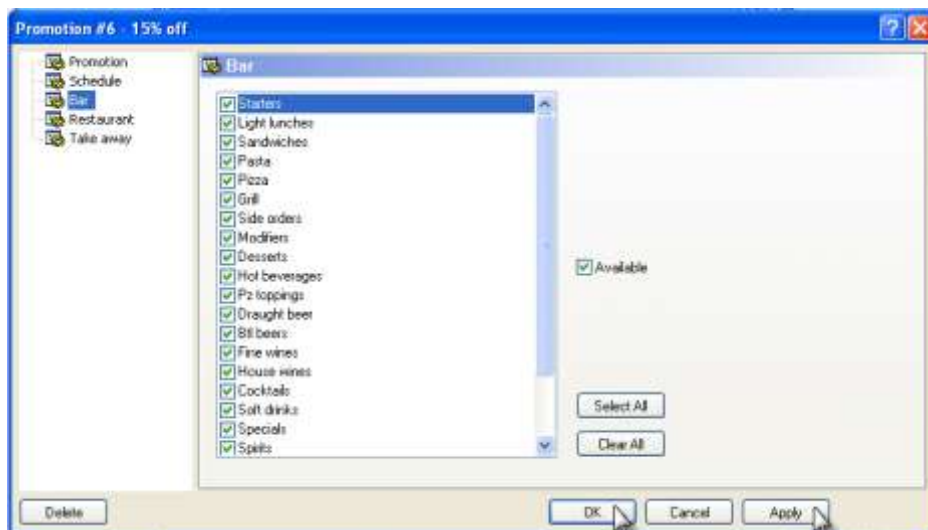
Select the division/s to be discounted.

To configure a food only discount simply unselect all the drinks divisions.
Click on Select All to include all divisions or Clear All to unselect all divisions.

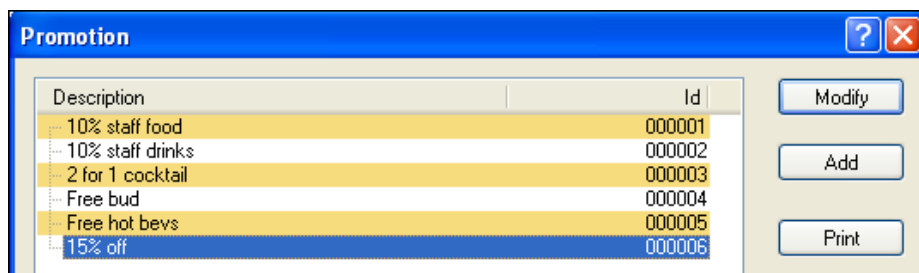
You MUST enable the Available option.



When the above is completed for all the revenue centers, click on Apply and OK



The new promotion is done!!

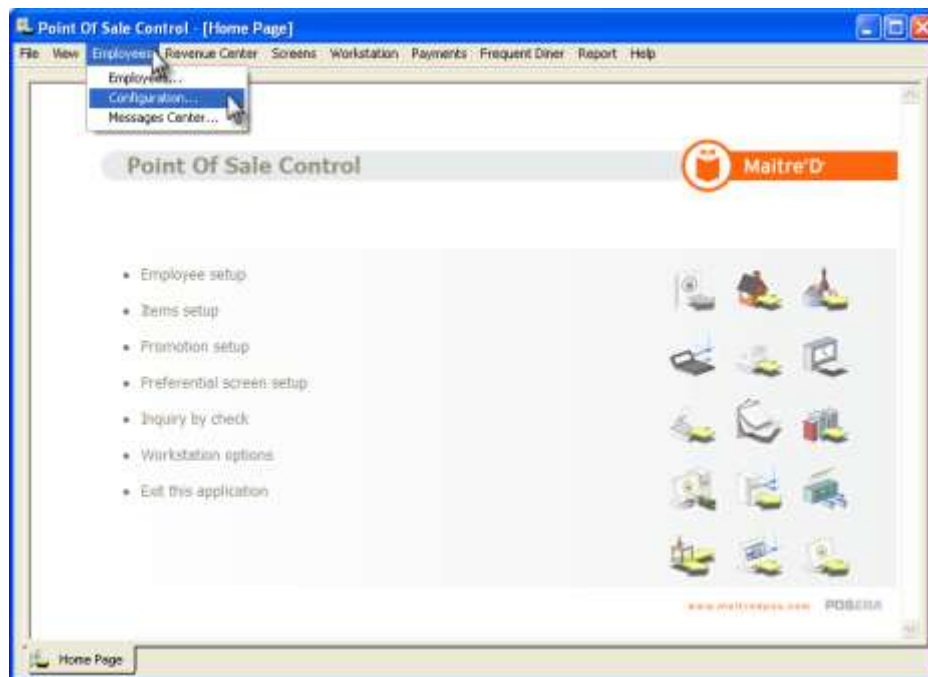




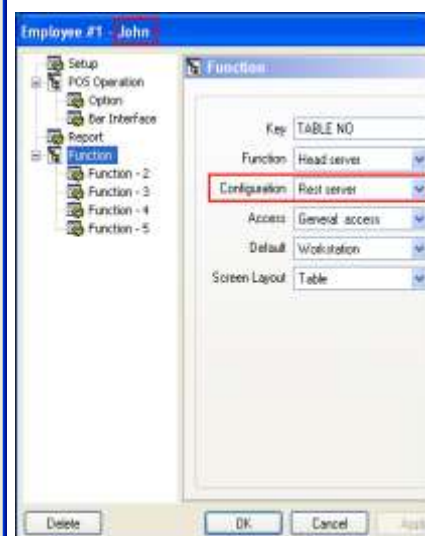
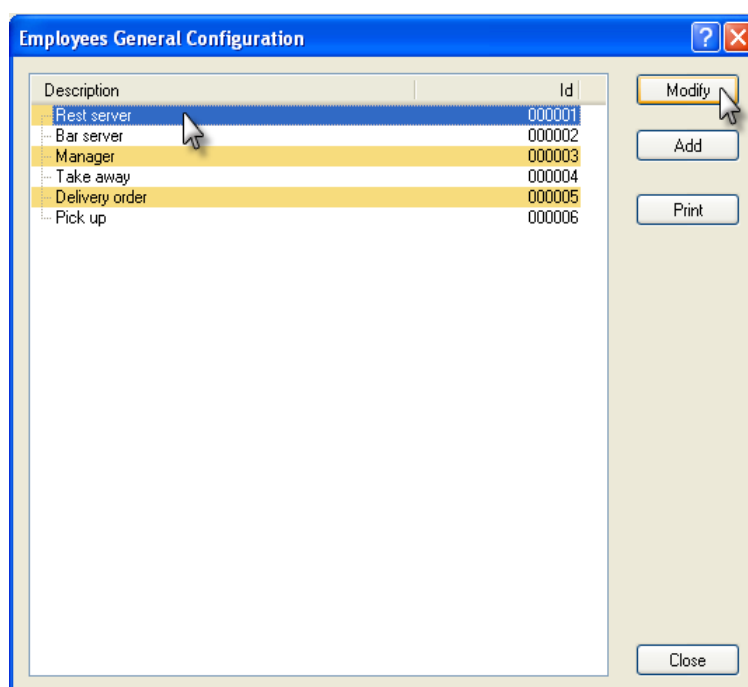
The next step in setting up promotions is to make them available in the employee general configurations.

Configuration is the area where all access rights are configured.

In **Pos Control** click on **Employees**
Click on **Configuration**



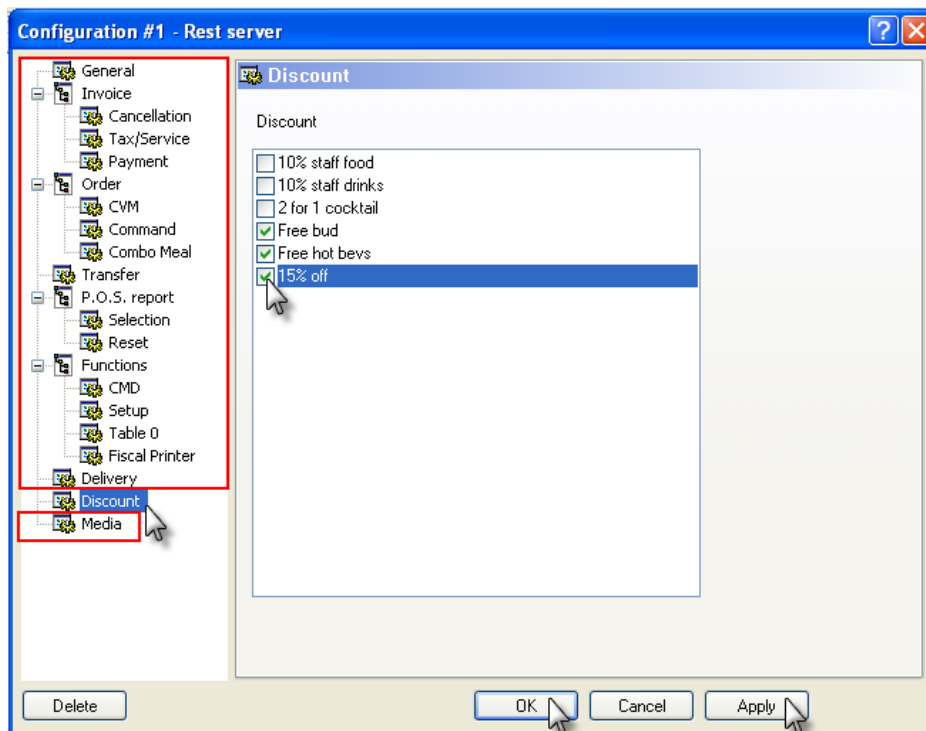
Double click on the relevant configuration/s – or click once and click on **Modify** – to make the discount available.





Click on Discount

Select the discount and click on Apply and OK

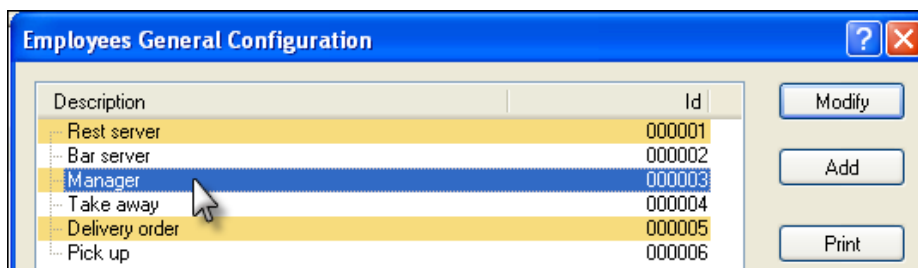


All other options highlighted in the red boxes have already been setup and should under NO circumstances be modified without first contacting your Maitre'D consultant.



Modifying these options could significantly alter the POS options of employees.

Select other configuration/s for which the discount is also to be made available and follow steps above.

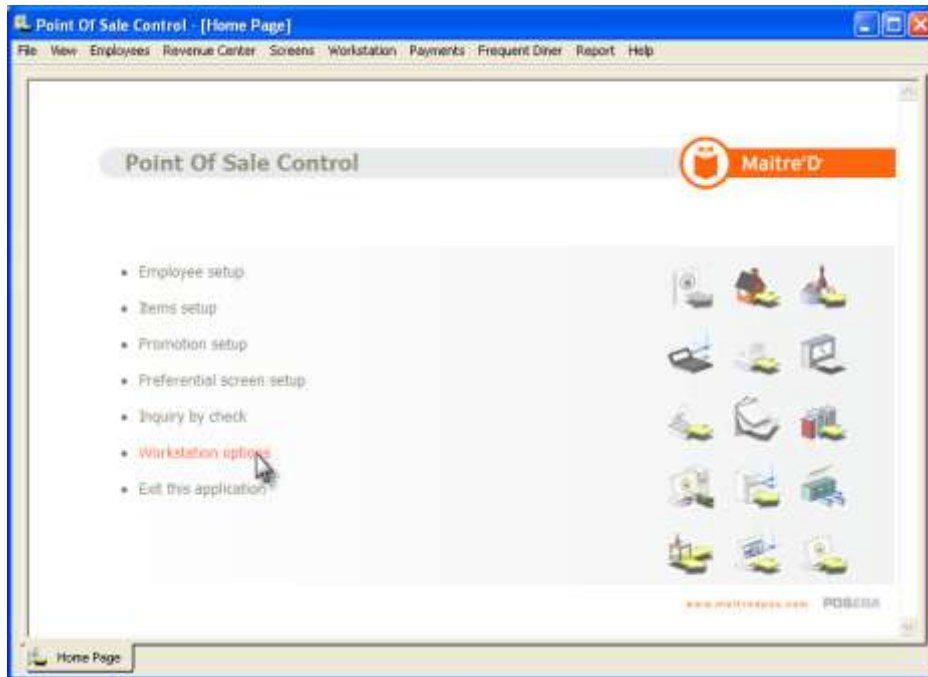


Remember you can always look at existing promotions to check how they are set up, if in doubt please contact your Maitre'D consultant who will be happy to provide the answers to your queries.



Modifying the Message on Customers Receipts

In **Pos Control** click on **Workstation Options**



The list below displays the number of workstations also called POS (the list in your system may contain a greater or lesser number of workstations).

Double click on Pos 1 or click once and click on Modify

A screenshot of the "Cash Register" window in the Maitre'D software. The window has a blue title bar with a question mark and a close button. It contains a table with two columns: "Description" and "Id". The table has three rows: "POS 1" with "000001", "POS 2" with "000002", and "POS 3" with "000003". A mouse cursor is pointing at the "POS 1" row. To the right of the table is a "Modify" button. At the bottom right is a "Close" button.

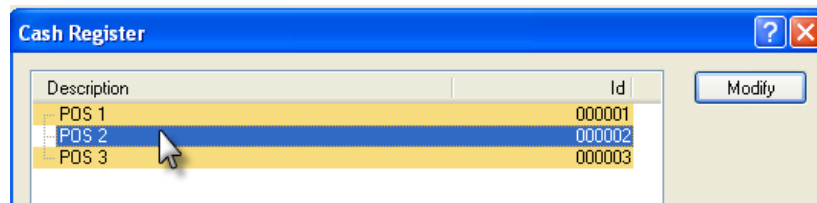
Click on Invoice and type the message you would like to appear at the bottom of customers checks after the general message. There is a maximum of 6 lines.

NB: the general message is configured by your **Maitre'D** consultant and is followed on the guest check by - You have been served by.

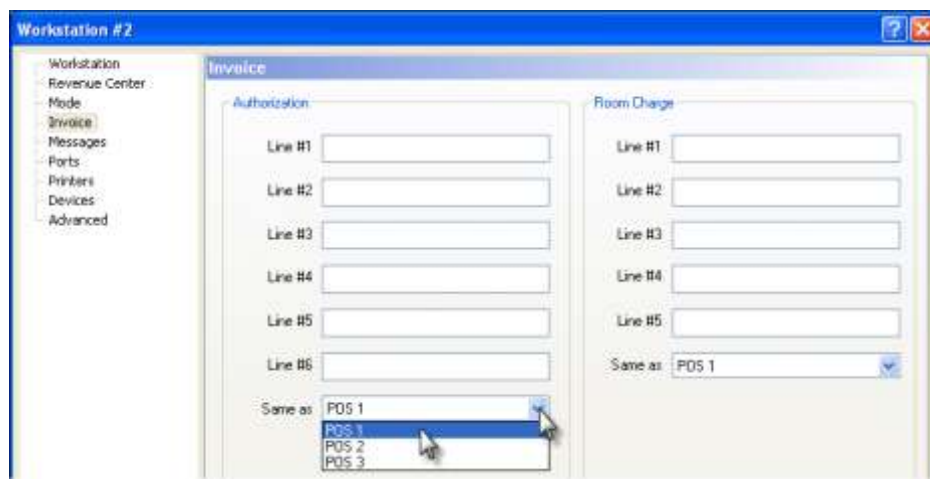
Click on Apply and OK

A screenshot of the "Workstation #1" window in the Maitre'D software. The window has a blue title bar with a question mark and a close button. On the left is a sidebar with a tree view containing "Workstation", "Revenue Center", "Mode", "Invoice" (selected), "Messages", "Printers", "Devices", and "Advanced". The main area is titled "Invoice" and is divided into two sections: "Authorization" and "Room Charge". The "Authorization" section has six text input fields labeled "Line #1" through "Line #6". The first three fields contain the text "THANK YOU", "FOR JOINING US!", and "PLEASE COME AGAIN!". The "Room Charge" section has five text input fields labeled "Line #1" through "Line #5". Below these sections is a "Same as" dropdown menu set to "POS 1". At the bottom are "Delete", "OK", "Cancel", and "Apply" buttons.

Now select POS 2



You can type a new message or you can click on Same as and select a message from another POS



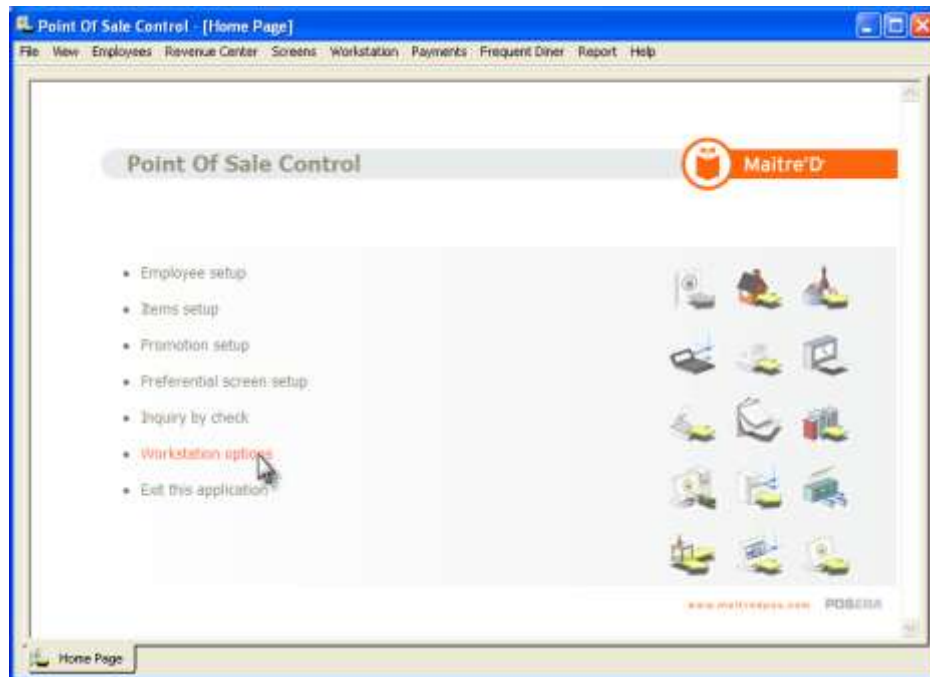
Modifying the POS Message

The Pos message area on the workstation default screen allows you to display a general information message.

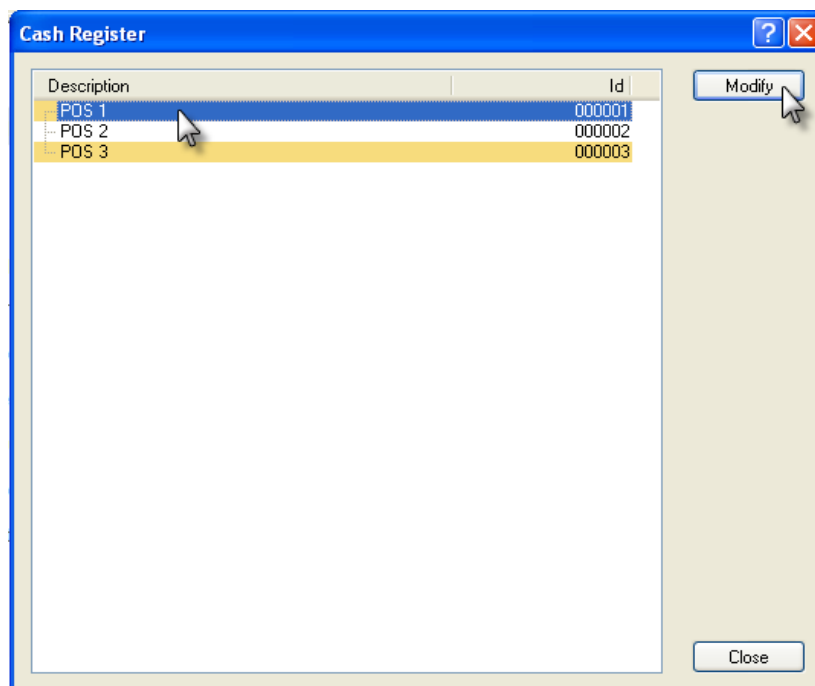




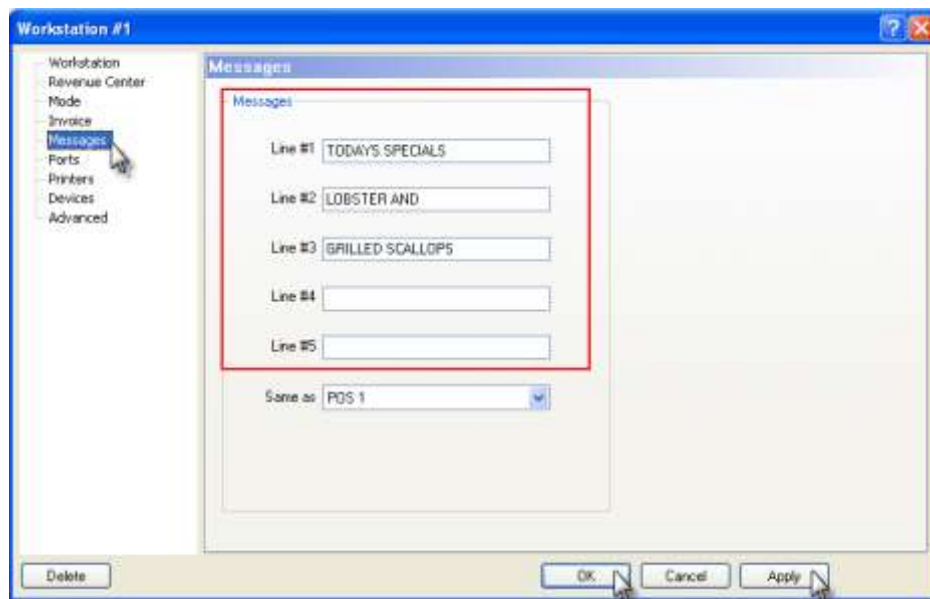
In **Pos Control** click on **Workstation Options**



Double click on **POS 1** or click once and click on **Modify**



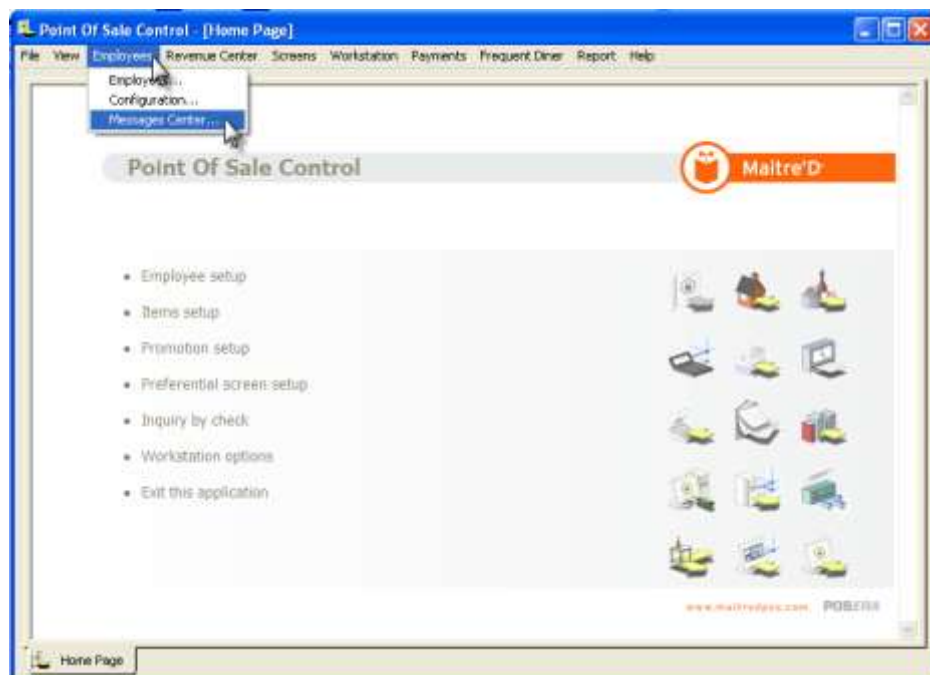
Click on **Message** and type in message. There is a maximum of 5 lines.



For the other POS you can type a new message or you can click on Same as and select a message from another POS.

Message Center

In Pos Control click on **Employees** and click on **Messages Center**





Click on Add

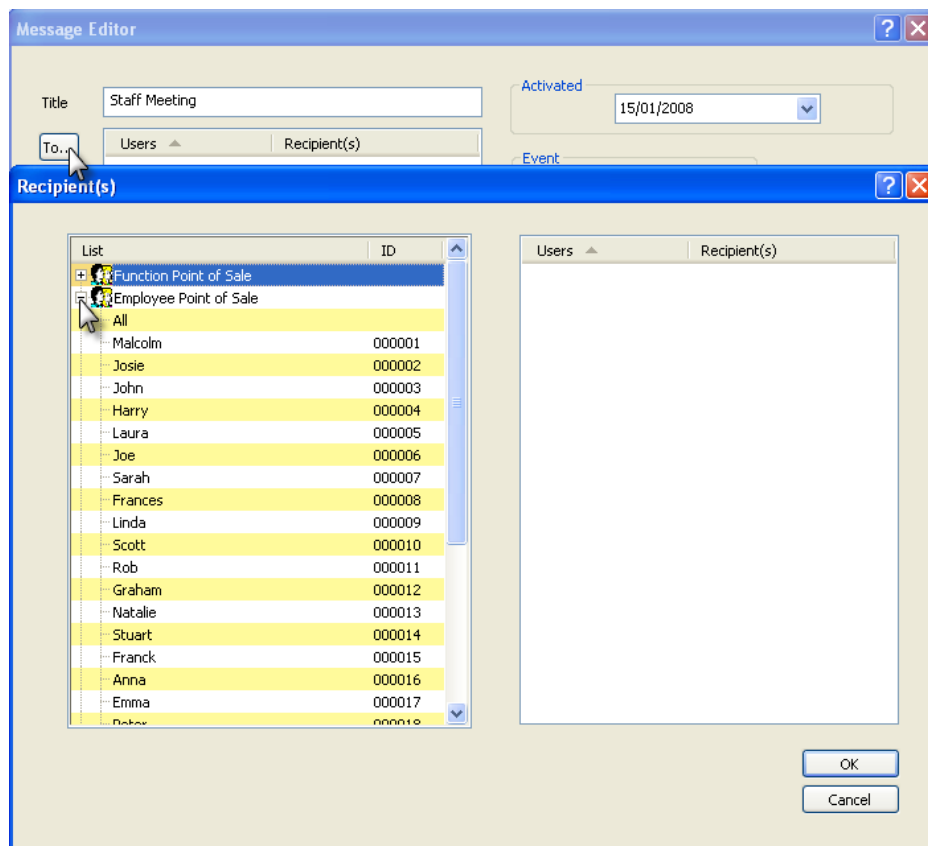
A screenshot of the "Messages List" dialog box. It has a blue title bar with a question mark and a close button. The main area is divided into two sections. The top section is a table with columns "Title", "Date", and "Completed On", which is currently empty. To the right of this table are three buttons: "Add", "Modify", and "Delete". The "Add" button is highlighted with a mouse cursor. The bottom section is titled "Message Overview" and contains three text input fields labeled "To...", "Event", and "Message". At the bottom right of the dialog are "OK" and "Cancel" buttons.

Type the message name and select the date you would like the message to be activated. By default, the date shown here is today's date.

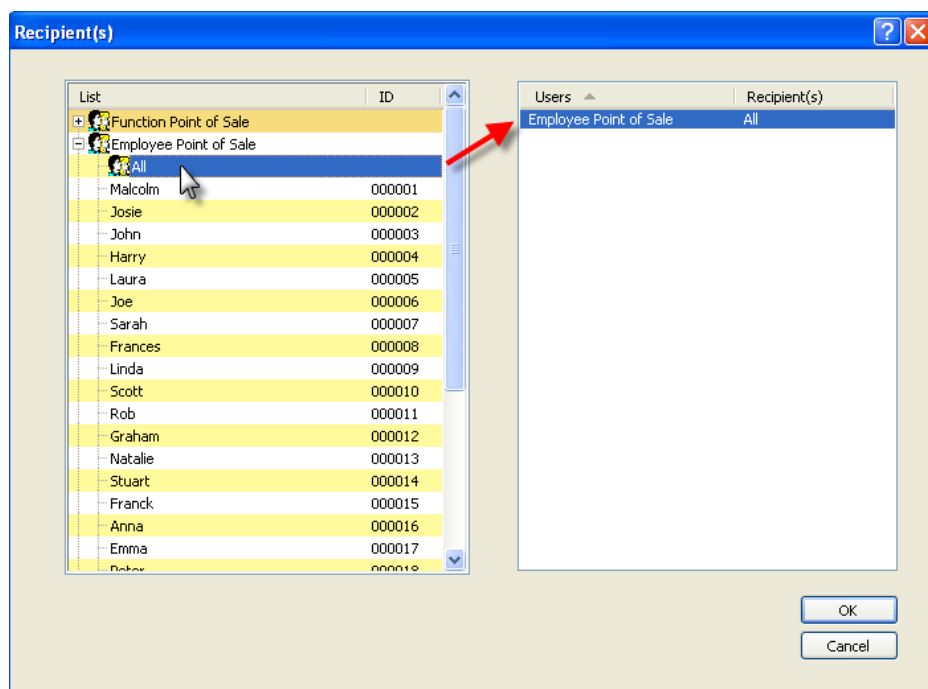
A screenshot of the "Message Editor" dialog box. It has a blue title bar with a question mark and a close button. The "Title" field contains the text "New Message". Below it, the "To..." field has two sub-fields: "Users" and "Recipient(s)". The "Activated" field is a date selector showing "15/01/2008", which is highlighted with a red rectangle. Below this is the "Event" section with three checkboxes: "Sign In", "Reading", and "Punch". To the right of these are "Preview" and "Reset" buttons. The "Message" section has two checkboxes: "Add Schedule to this Message" and "Continuous". A large text area for the message content is at the bottom. At the bottom right are "OK" and "Cancel" buttons.



Click on To... and click on  besides Employee Point of Sale to open the list of employees.

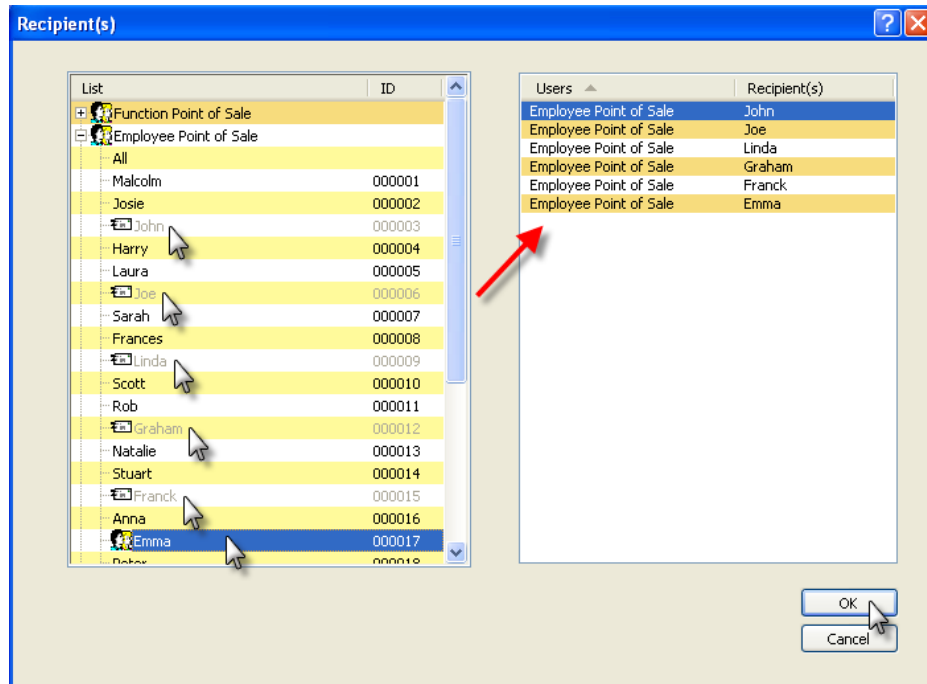


Double click on All to include all the employees or ...





Select individual employee by double clicking on individual names.



Click on OK to close.

Select the Sign In option – the employees will see the message at first sign in on the POS terminal.

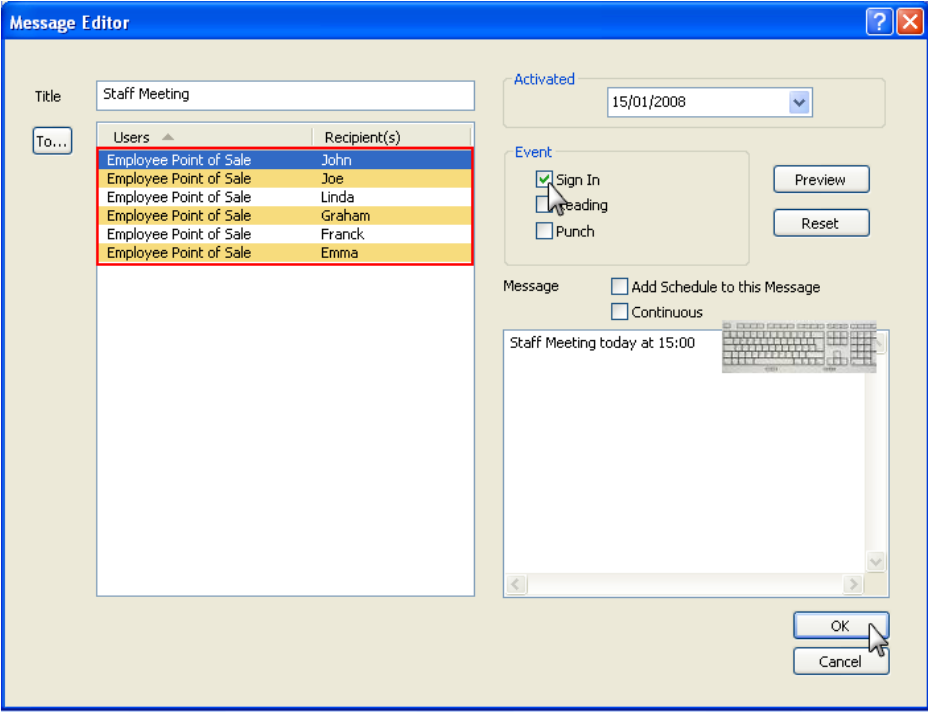
Other options available are Reading – the employees will see the message when taking a server reading.

The Punch option is for employees who Clock in and Out when the Time and Attendance module has been installed.

The option Add Schedule to this Message is only available with the Time and Attendance module.

If the option Continuous is enabled it will display the message every time an employee signs in, punches in, or prints a reading.

Type the message you wish to appear on the POS terminal and click OK.



Message Editor

Title: Staff Meeting

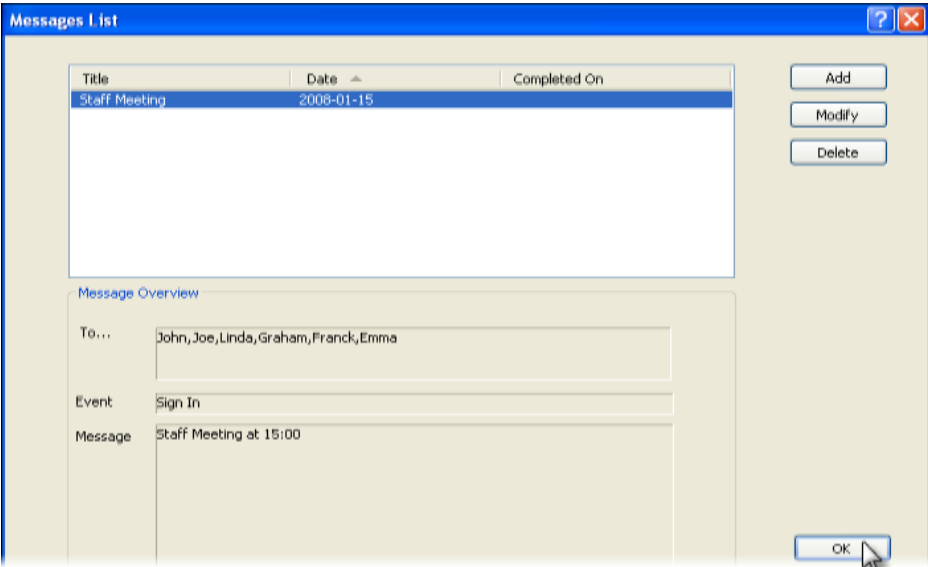
Activated: 15/01/2008

Event: ☒ Sign In, ☐ Reading, ☐ Punch

Message: ☐ Add Schedule to this Message, ☐ Continuous

Staff Meeting today at 15:00

OK, Cancel



Messages List

Title	Date	Completed On
Staff Meeting	2008-01-15	

Message Overview

To...: John, Joe, Linda, Graham, Franck, Emma

Event: Sign In

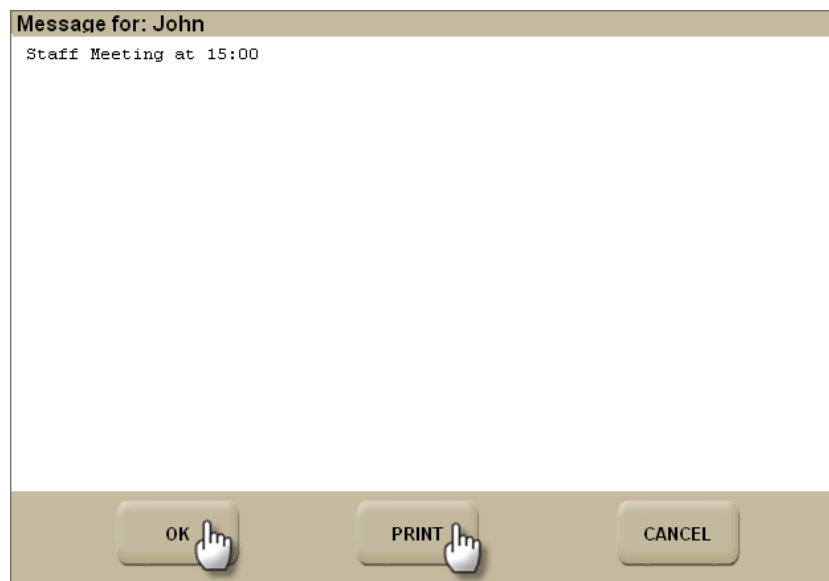
Message: Staff Meeting at 15:00

OK

When John enters his number, the message will display on the POS terminal – he must press OK to acknowledge the message. The message can also be printed.

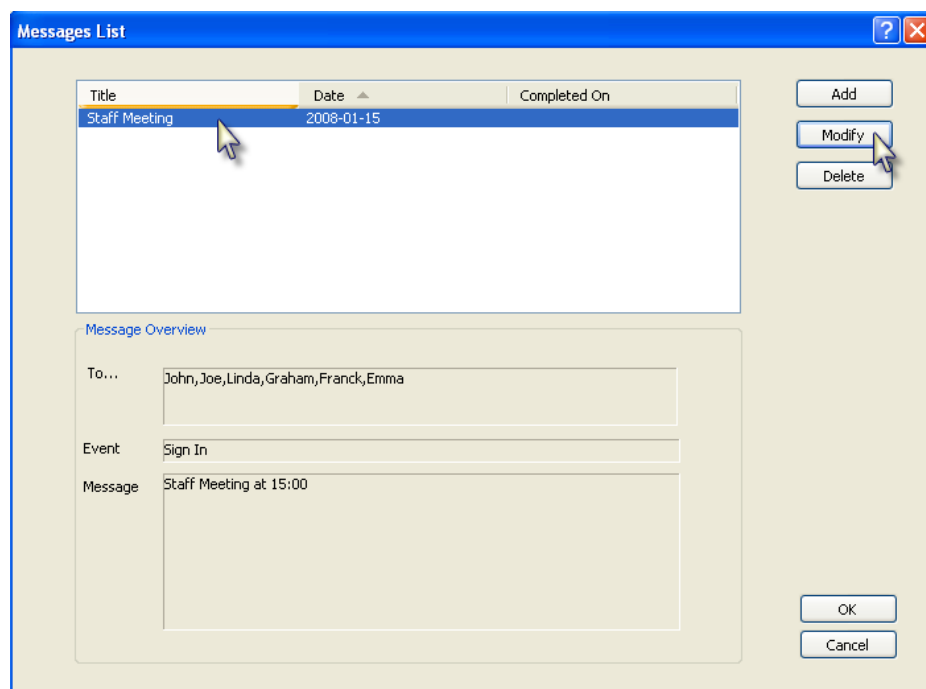
Once it has been acknowledged the message will not display again.

If Cancel is pressed the message will display again the next time John enters his number on the POS terminal.



You can check from the back office the employees who have seen the message.

In the message center, click on the relevant message and click on Modify



Click on Preview



Message Editor

Title: Staff Meeting

Activated: 15/01/2008

Event:
☒ Sign In
☐ Reading
☐ Punch

Message:
☐ Add Schedule to this Message
☐ Continuous

Staff Meeting at 15:00

OK
Cancel

Users	Recipient(s)
Employee Point of Sale	John
Employee Point of Sale	Joe
Employee Point of Sale	Linda
Employee Point of Sale	Graham
Employee Point of Sale	Franck
Employee Point of Sale	Emma

The employee highlighted in the red box has read the message. Click on Close

Message/Employee(s)

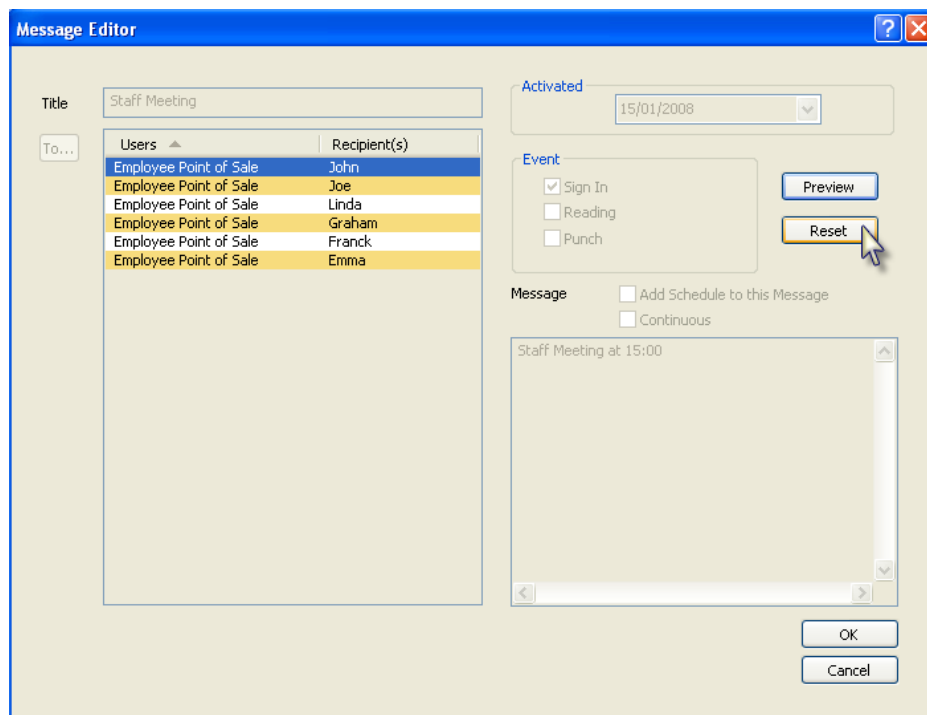
Users	Date
John	2008-01-15
Joe	
Linda	
Graham	
Franck	
Emma	

Close

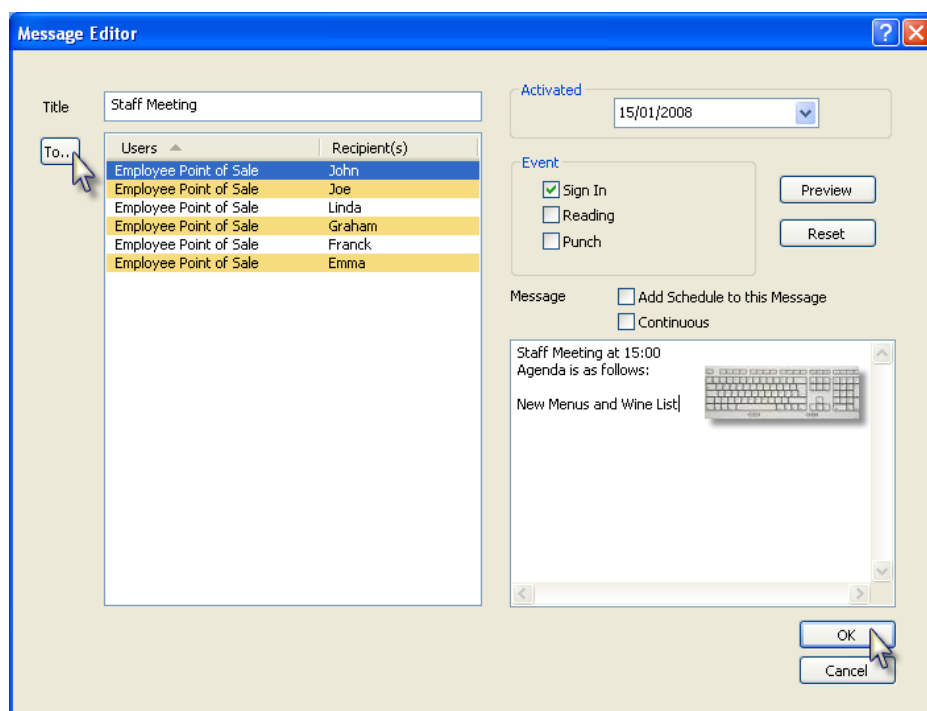


The option **Reset** will cancel the message status to allow for modification of the message and the employee list.

Click on **Reset**



You can now modify the message.
Click on **OK** to close.



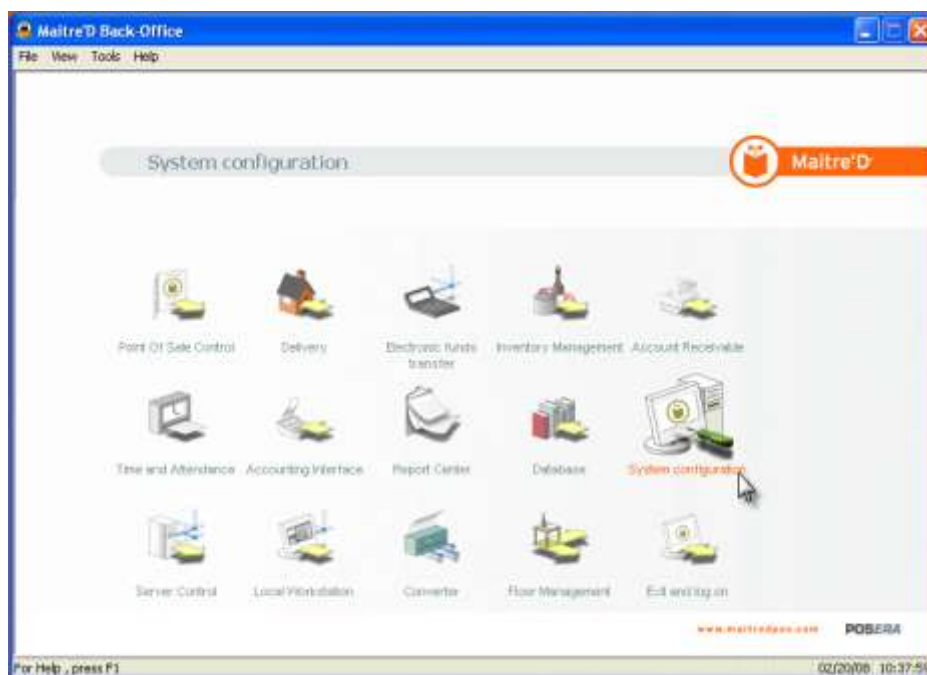


Backups

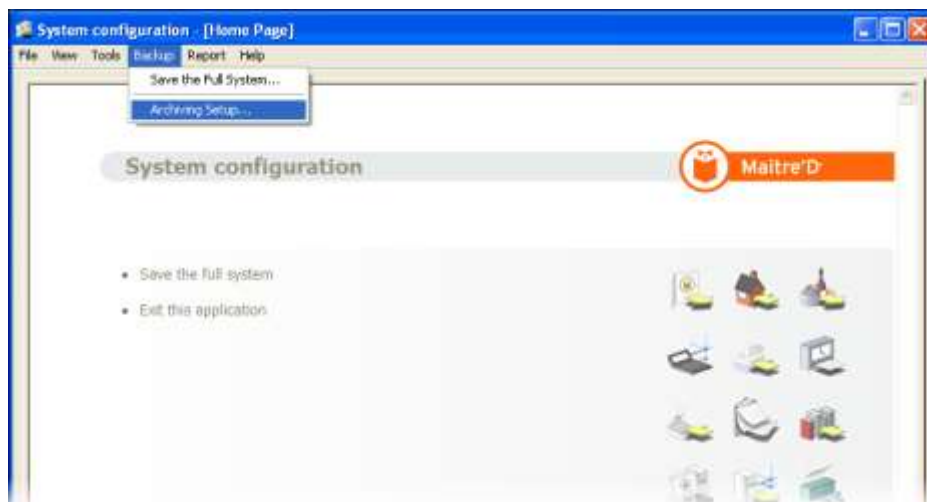
We recommend taking a backup at least once a month. Backups should be taken on removable media such as data disk or compact disks if your back office computer is equipped with a compact disk writer.

Sites with backup servers have automated data backup of all the data on the system as well as the archive folder (transactions file). Even with the presence of a backup server we recommend taking backups (of both the data and the archive) at regular intervals on an external media source.

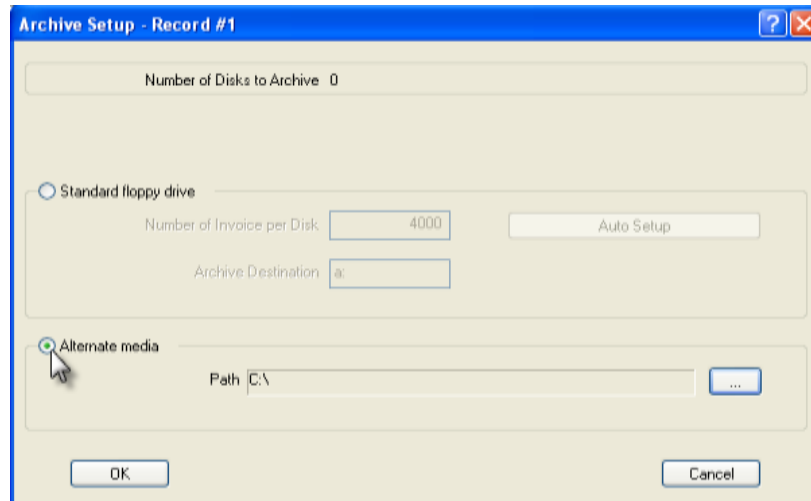
From the back office select [System Configuration](#)



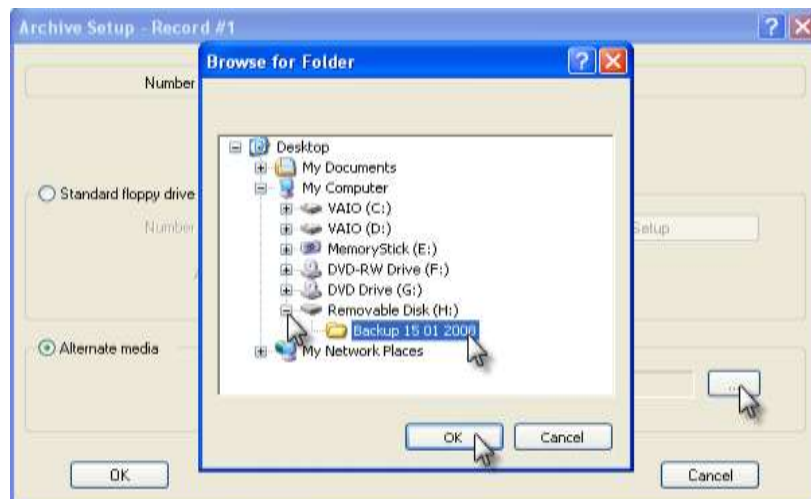
Click on [Backup](#) and click on [Archiving Setup](#)



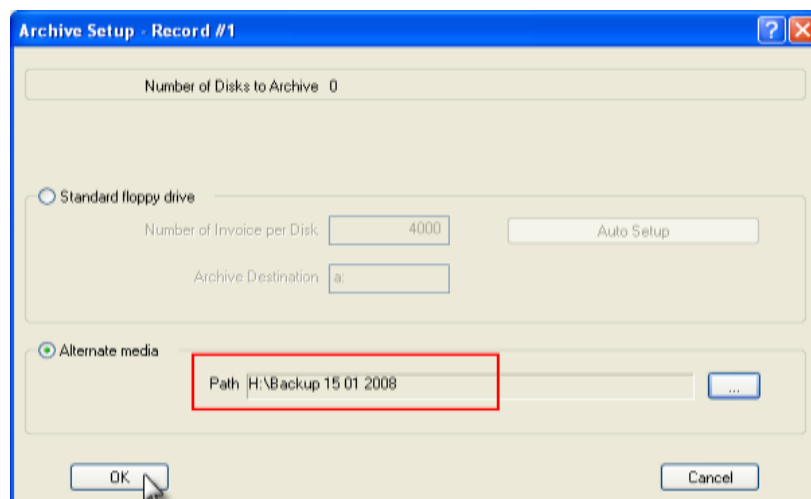
Select **Alternate Media**



Select where you want the program backed up.
We suggest creating a folder with the date as shown below. Click on OK

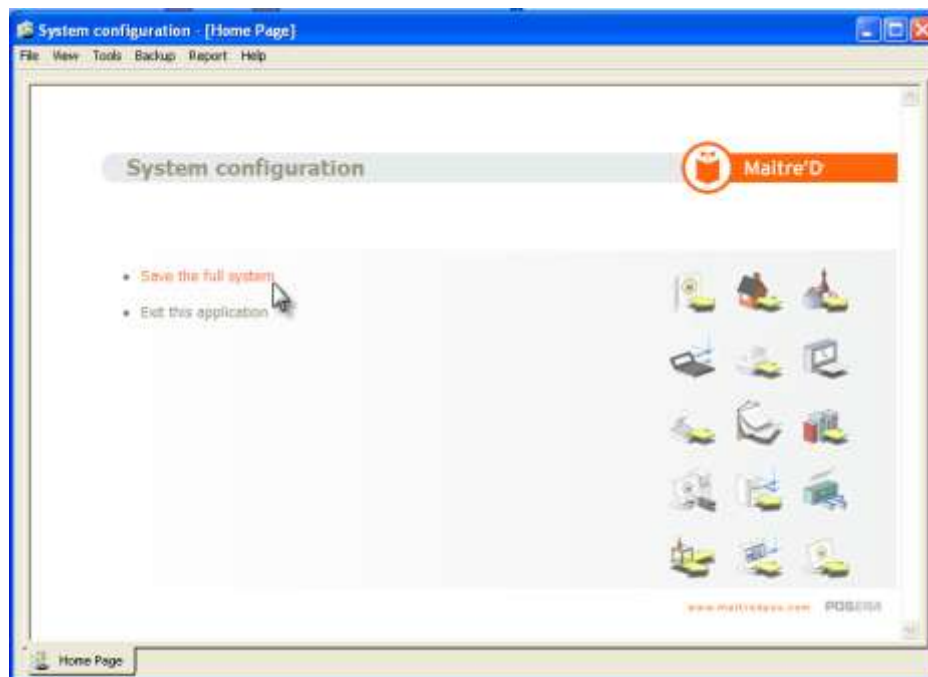


Click on OK

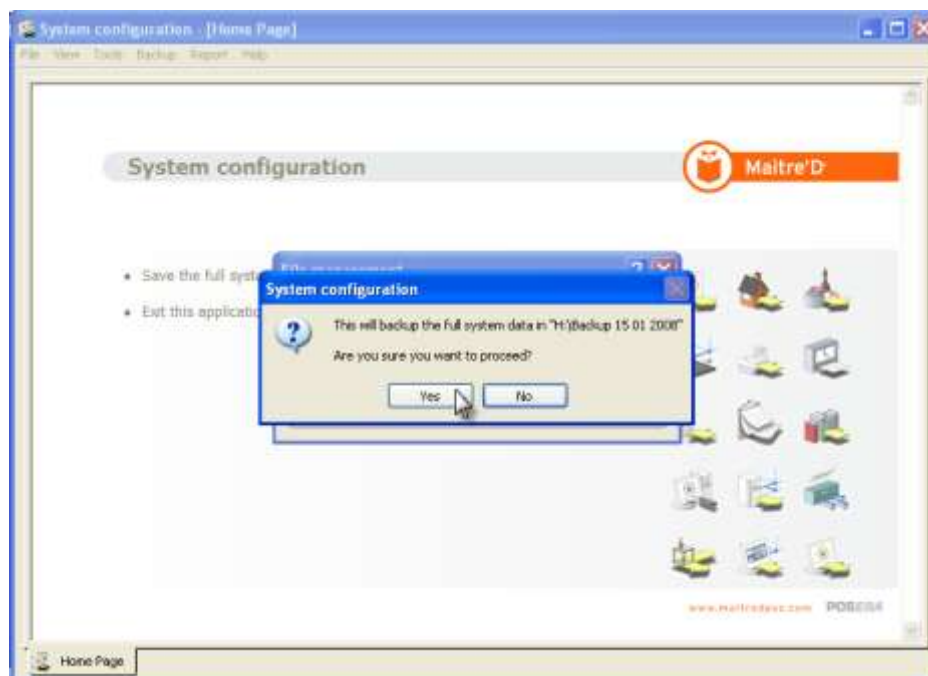




Click on **Save the full system**



Click on **Yes**

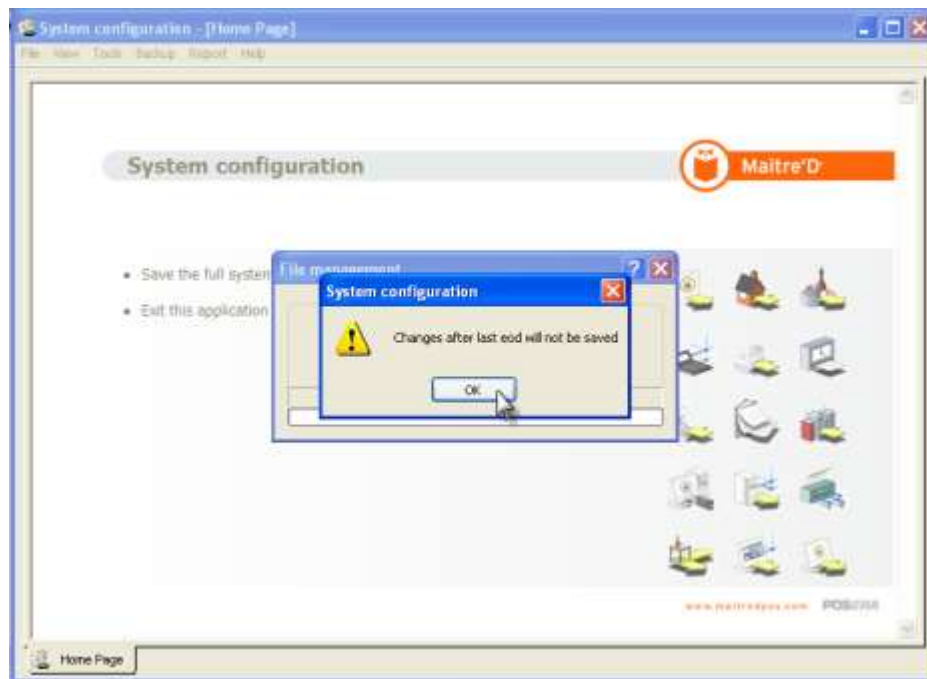




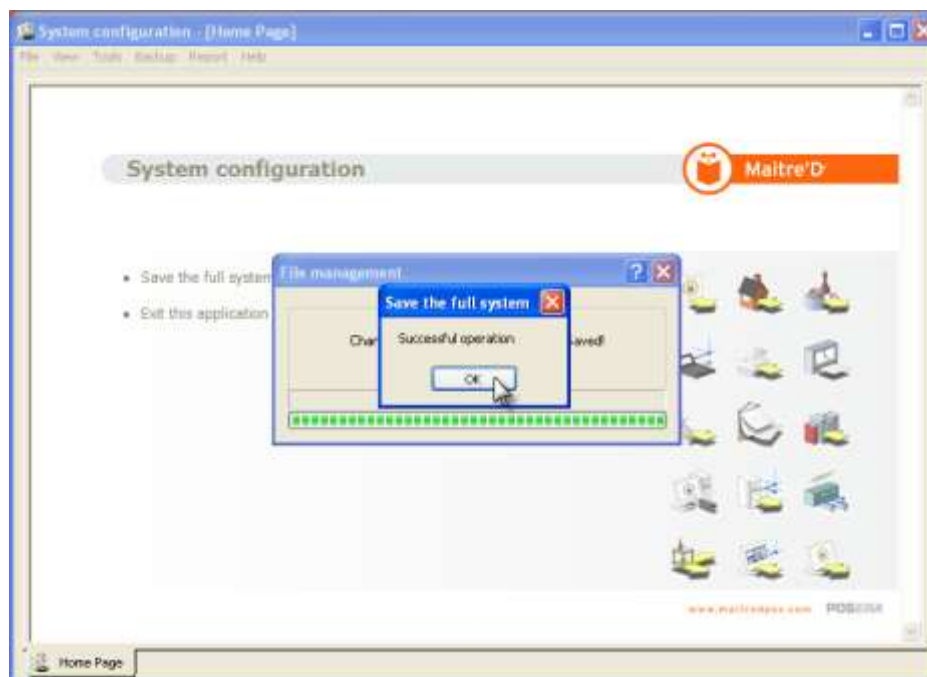
The following message will be displayed on the screen – click on Yes.

This is to remind you the data saved will not include programming changes carried out after the last end of day.

We recommend taking backups first thing in the morning before opening time.



Click on OK

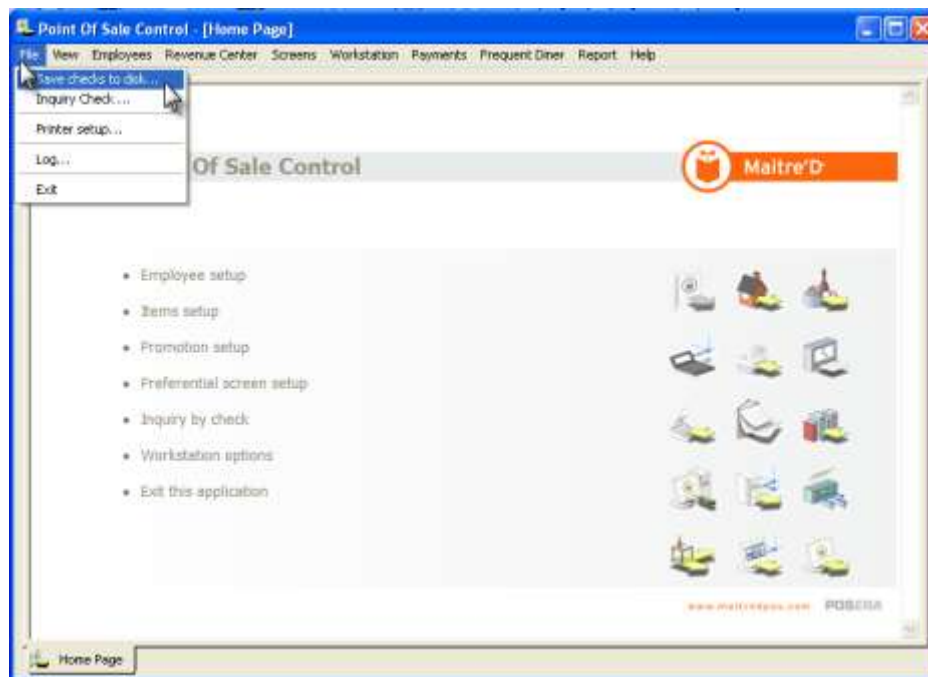




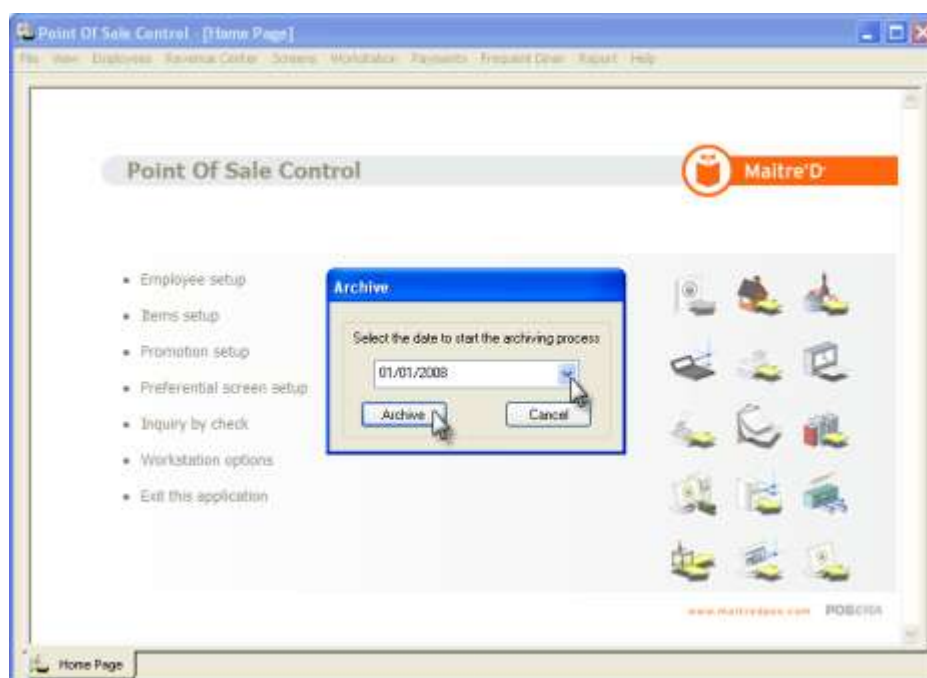
The complete data and sales information is now saved.

**However, the transactions are not saved from this operation.
To save every transaction from the archive folder proceed as follows:**

In **POS Control click on **File** and click on **Save checks to disk****

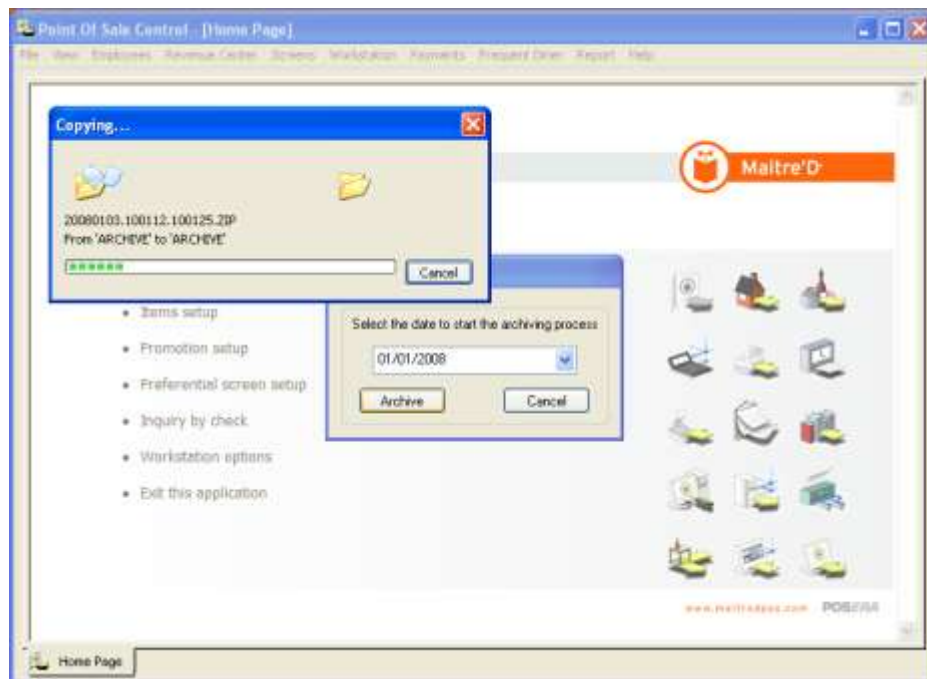


**From the calendar select the date you want to start the archiving from.
Example below: last backup taken on the 31st December 2007**

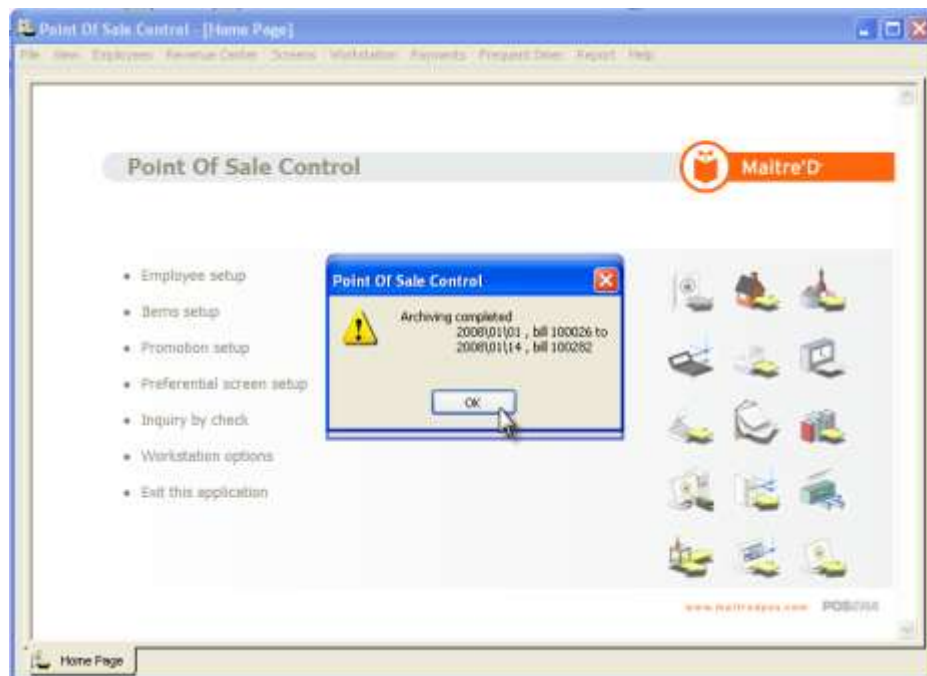




Copying the transaction files ...



Process is completed – click OK to Close



Complete data, sales and transactions are now saved to the folder on the removable disk.

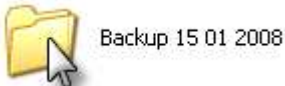
See next page →



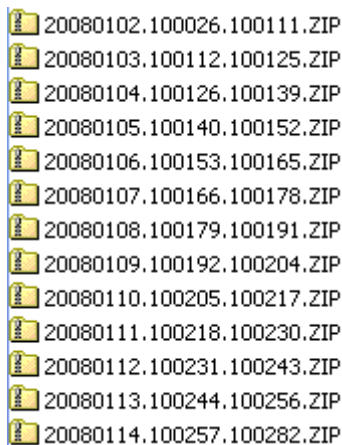
Double click on the removable disk



Double click on the folder



Double click on Archive - the archive folder contains all daily transactions



Double click on FULL0001 – this folder contains all configuration and sales data



Now you have all the information don't forget to store it in a safe place!!

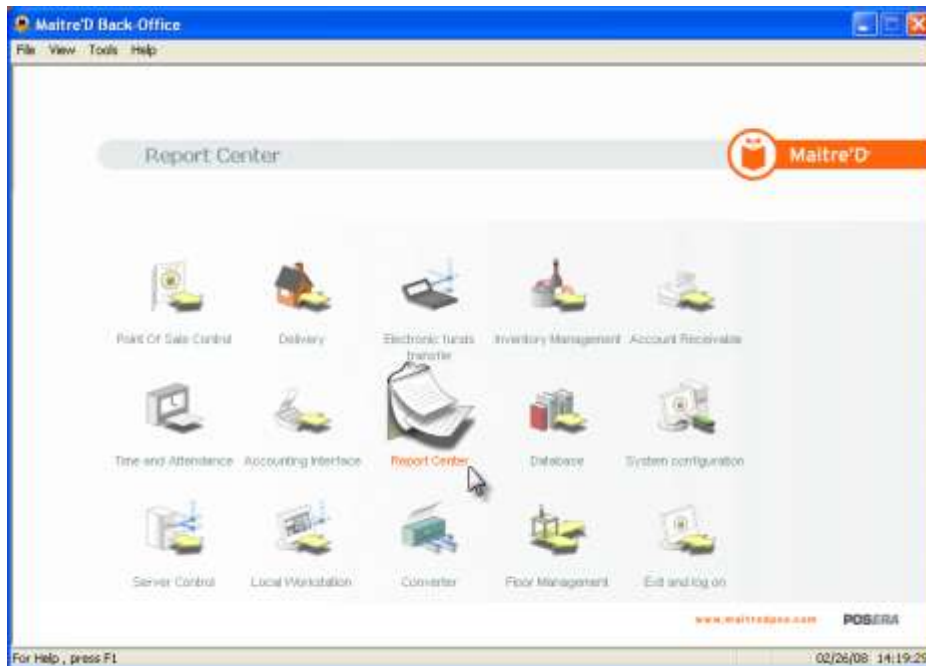


Report Center

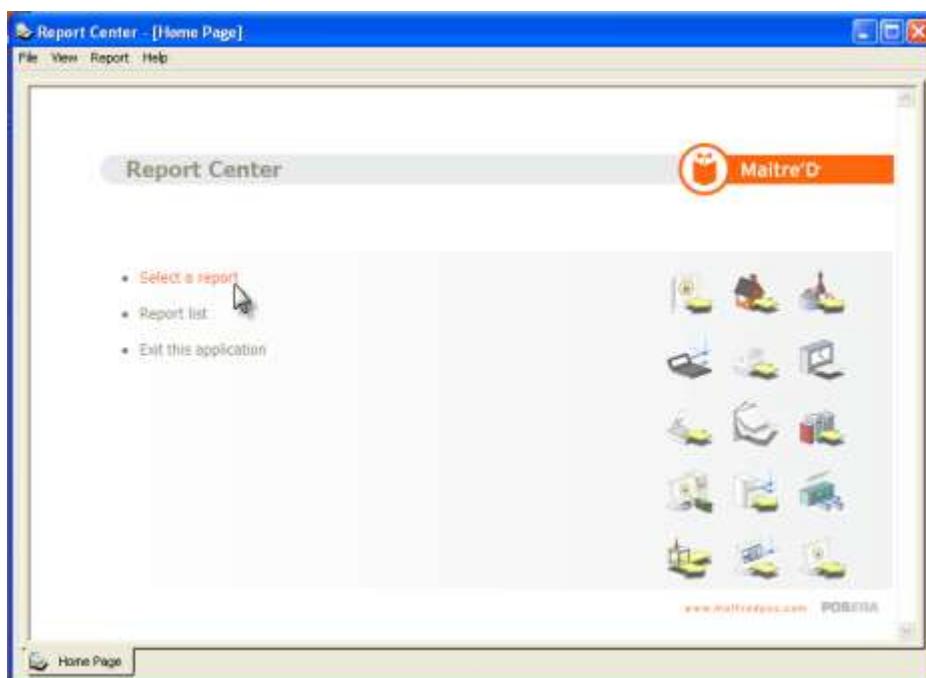
The Report Center option from the Maitre'D back office allows you to access the report template menu of the Report Center module.

Every report template is available under its category tab / section.

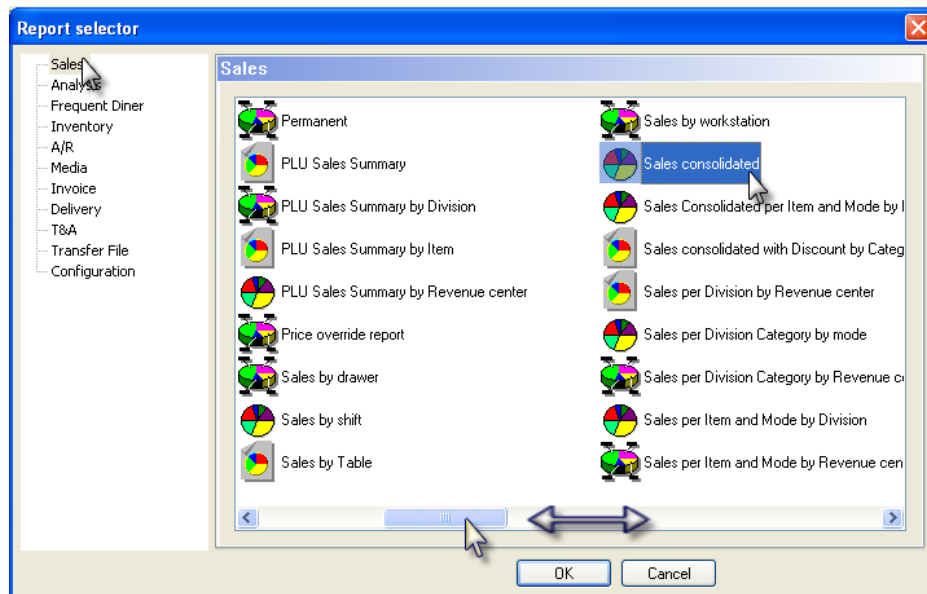
From the back office select **Report Centre**



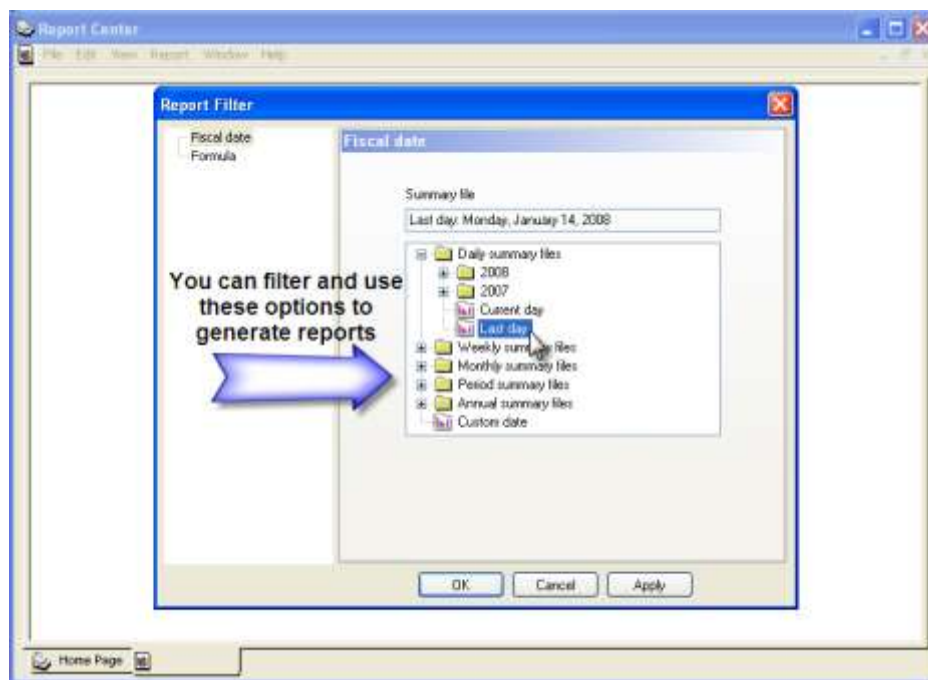
Click on **Select a report**



In the Sales section the most commonly used report is the Sales Consolidated



Select Last day to view yesterday's sales

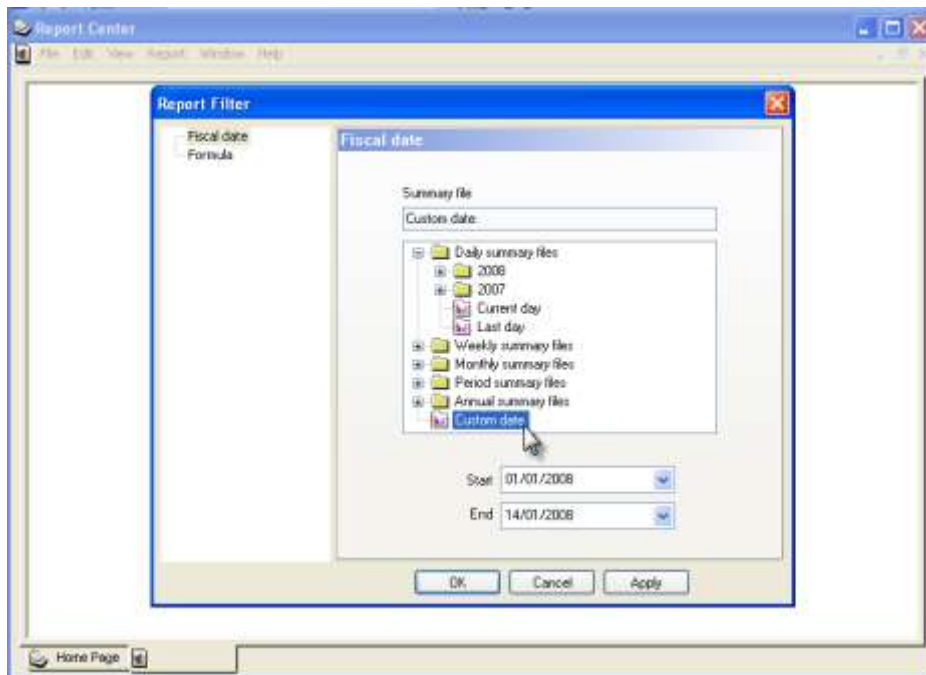


**You can also select weekly, monthly etc...
Custom lets you choose a start and finish date**

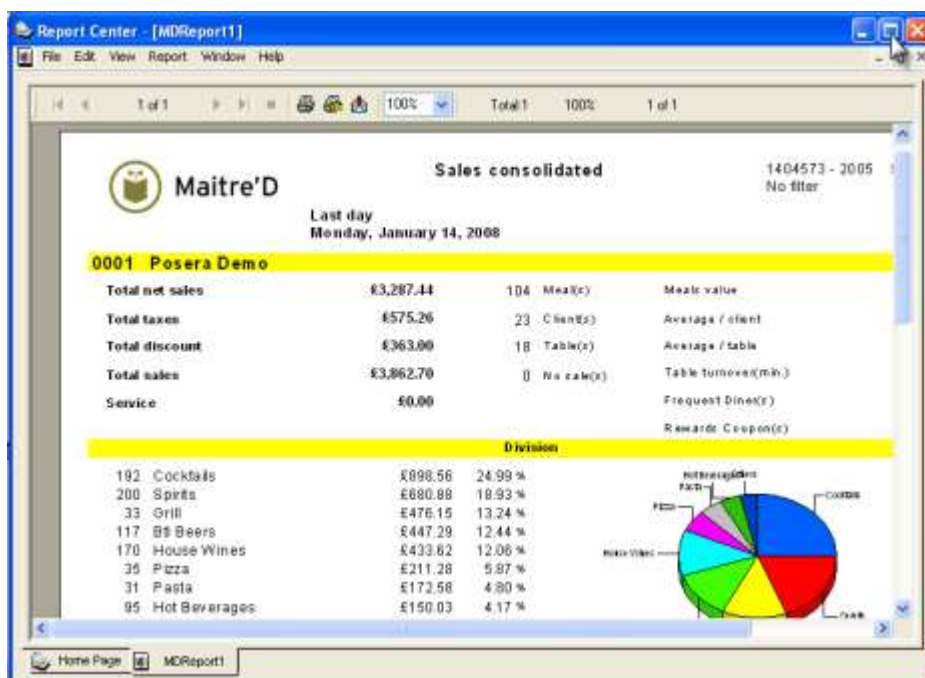
See example on next page →



Example: Custom date



You can enlarge the window to view the report



For more information please refer to the Report Center Manual.



This manual is available on **PDF** format and should be kept on your back office hard drive. Ask your **Maitre'D** consultant to point its location.



Troubleshooting

Before calling the support department please check the following:

My system is down:

In the first instance please check the **Maitre'D** server is running.

What is the **Maitre'D** server



The Maitre'D server ensures communication and transfer of data between the back office and the POS terminals.

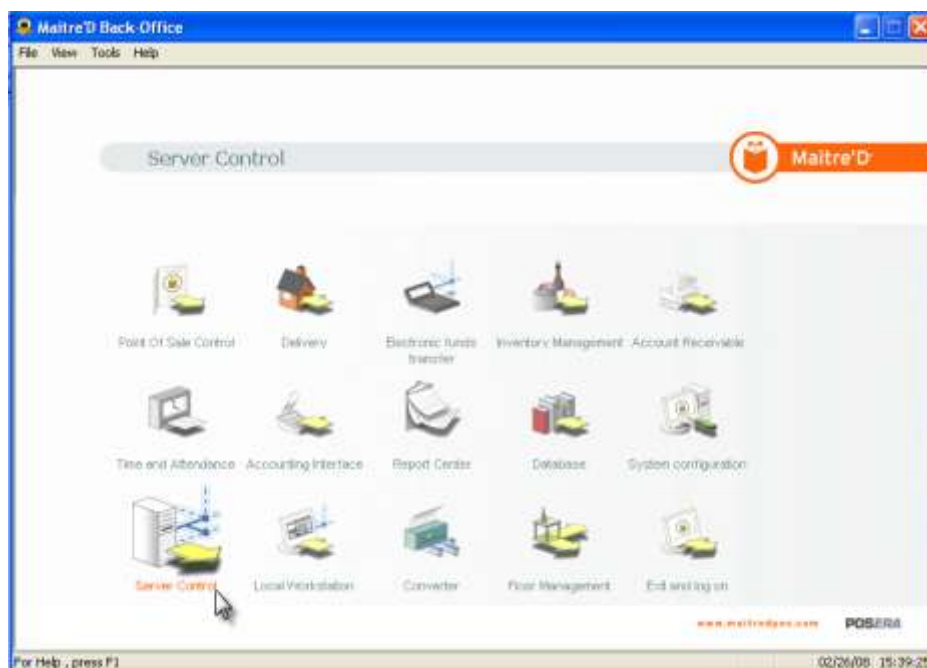
It is located on the toolbar of your back office computer on the right hand side of the screen. See below:



What should you do if you do not see this icon?

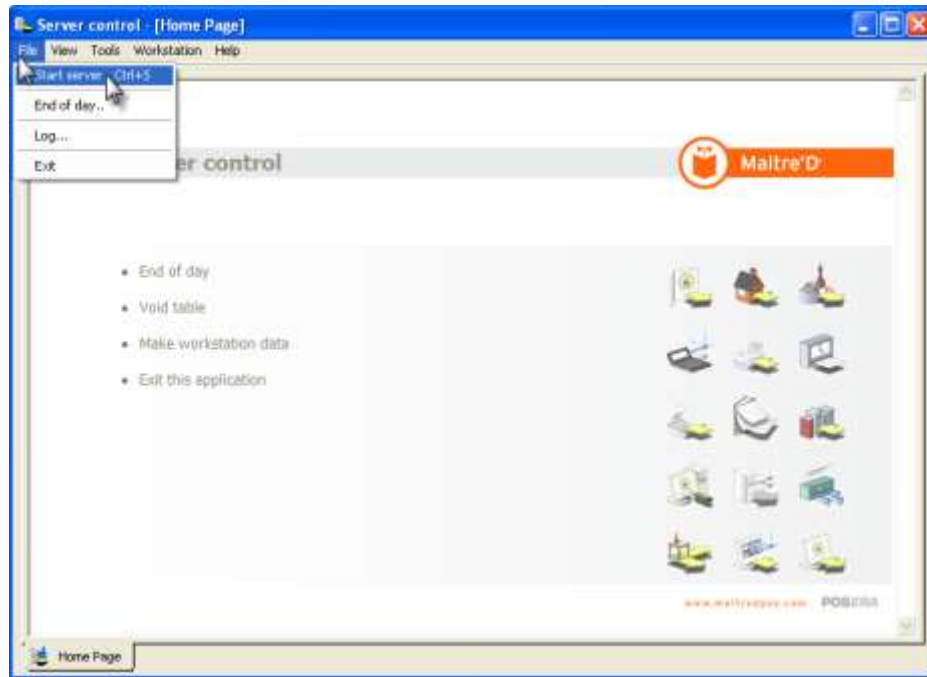


From the back office select **Server Control**





Click on File and click on Start Server – the icon will reappear first with a red cross  followed by a change of status (green and yellow)  and finally back to normal status  in its usual place.



This process should take no longer than a few seconds – depending on the number of POS terminals.

You may sometimes notice a change of status to green and yellow during the day or night – the **Maitre'D** server will fluctuate between green and red and green and yellow.

This is normal and indicates a large amount of network traffic between the POS terminals and the back office – noticeable during peak time of service.

As an alternative to starting the **Maitre'D** server from the back office as illustrated above you can also restart the main back office computer. The **Maitre'D** server is part of the start up process and will resume its usual position and status on the toolbar after restarting your computer.

If the **Maitre'D** server is staying on the following status  for longer than a few minutes then it is possible you might need to recreate Workstation Data (explained later in this section).

The **Maitre'D** server should never stay on the following status  for longer than a few seconds.

Should the server remain in this status please call the support line.



One of my POS terminals is down:

If one of the POS terminals is not responding the network cable may be unplugged.

In the first instance check and verify all the cables are properly connected.

If all cables appear to be connected but the POS terminal is still frozen then proceed to restart the POS terminal. It will restart the POS network services.

You may also need to check the status of printers, if the POS terminal has one or more printers attached as devices.

Make sure the printers are switched on and operational.

Please note:



During the installation of your **Maitre'D** system please make sure you keep a note of the location of the network switch.

This is the nerve center which connects all the POS terminals with the back office and manages all the data transfer.



THIS NETWORK SWITCH MUST ALWAYS BE SWITCHED ON



Your **Maitre'D** consultant will have pointed out during the installation the location of all hardware, cables, network points, network hub/switch as well as demonstrating operations such as printer resets, closing and restarting a POS terminal and re-booting the main server.

This is extremely important to ensure the reliability of your POS system.



WHAT I MUST KNOW ABOUT MY POS SYSTEM

- ✓ Location of network hub / switch
- ✓ Connection of Back Office computer to network
- ✓ Connections of all POS terminals to network sockets
- ✓ Connections of all printers (both receipts and kitchen / bar)
- ✓ Connections of all cash drawers
- ✓ Location of back up server (if applicable)
- ✓ How to reset a printer (both receipts and kitchen / bar)
- ✓ How to restart a POS terminal
- ✓ How to re-boot the main Back Office Computer
- ✓ How to make workstation data (documented on next page)

Should you require additional information please contact your **Maitre'D** consultant who will be happy to help you.



How to create workstation data:

Sometimes it may be necessary to update / refresh the POS terminals – after programming screen changes for example, or if you notice the POS terminals running slower than usual.

This can also be done in the case of the **Maitre'D** server status on 

Creating workstation data will update the POS terminals with the new data.

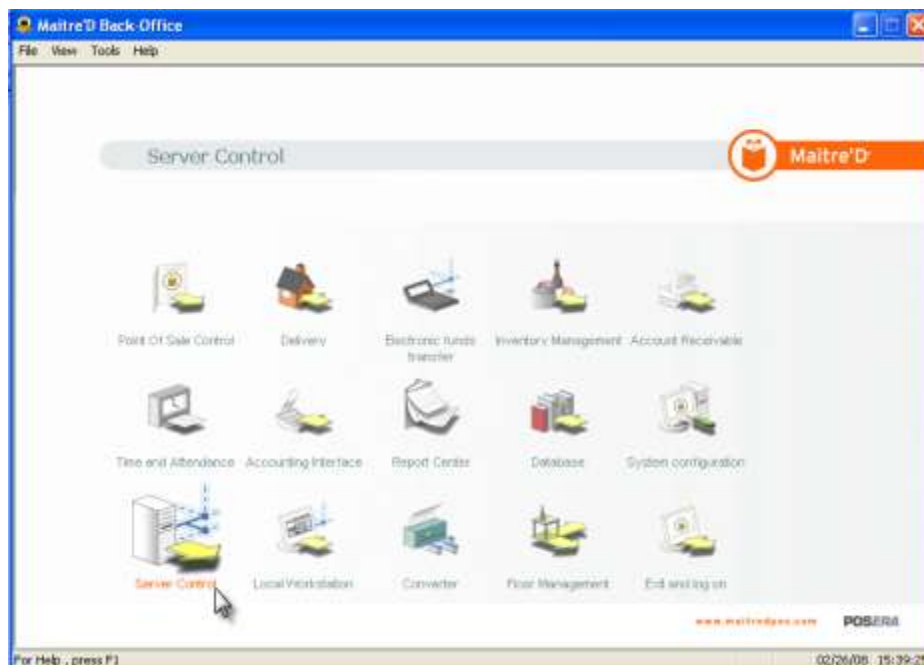
Please note:

Creating workstation data will restart the POS – this process is usually very fast (10-15 seconds) but can take longer if you have many POS terminals.



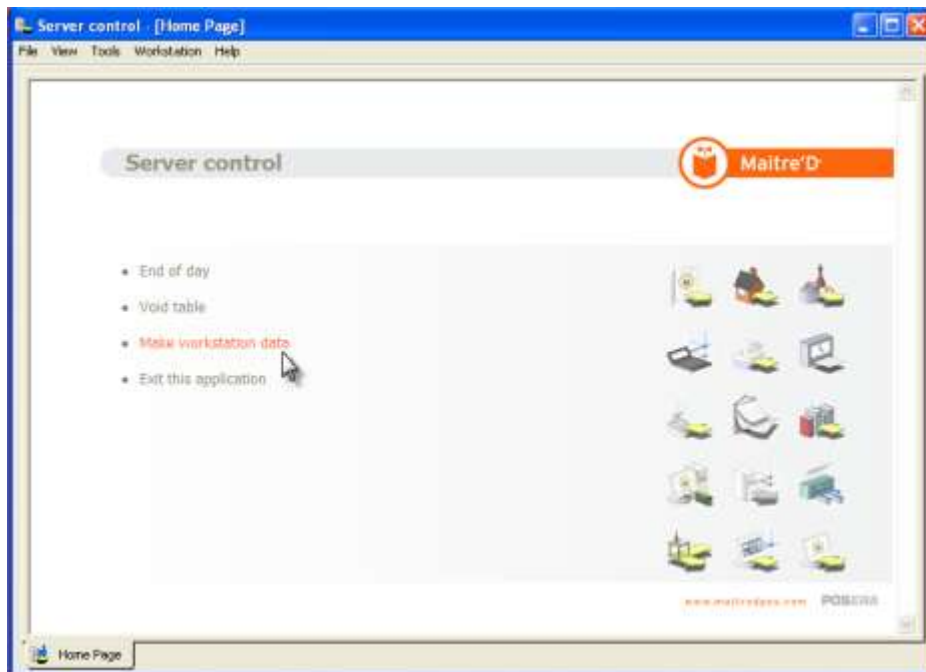
Do bear in mind the POS terminals would therefore not be accessible during this time – so avoid creating workstation data during service unless it's strictly necessary for the reasons outlined above.

From the back office select **Server Control**



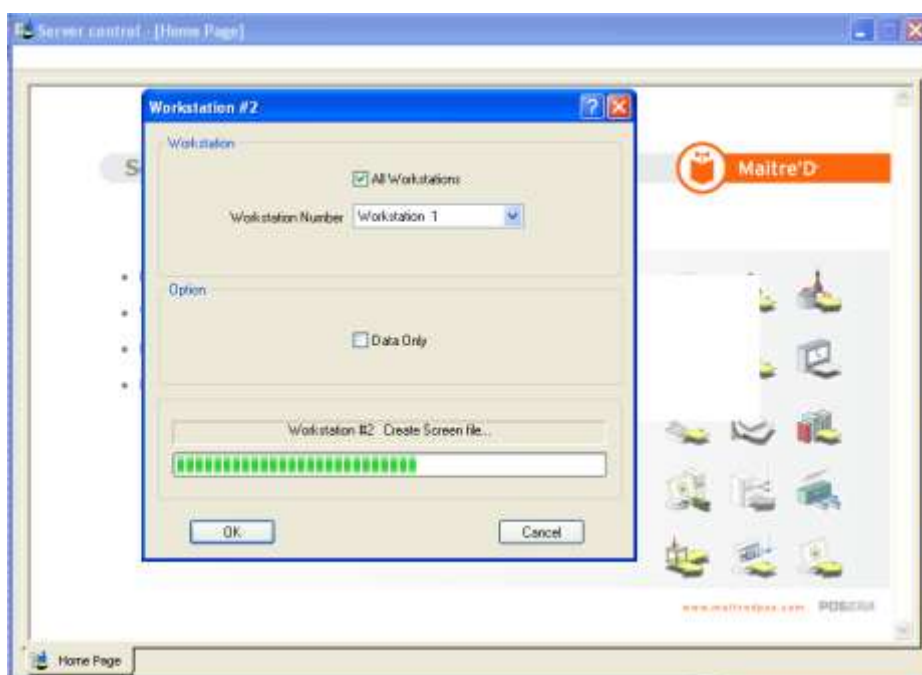


Click on Make workstation data



The process starts and finishes automatically; you do not need to click on any options.

It will take between 15 – 30 seconds depending on the number of POS terminals

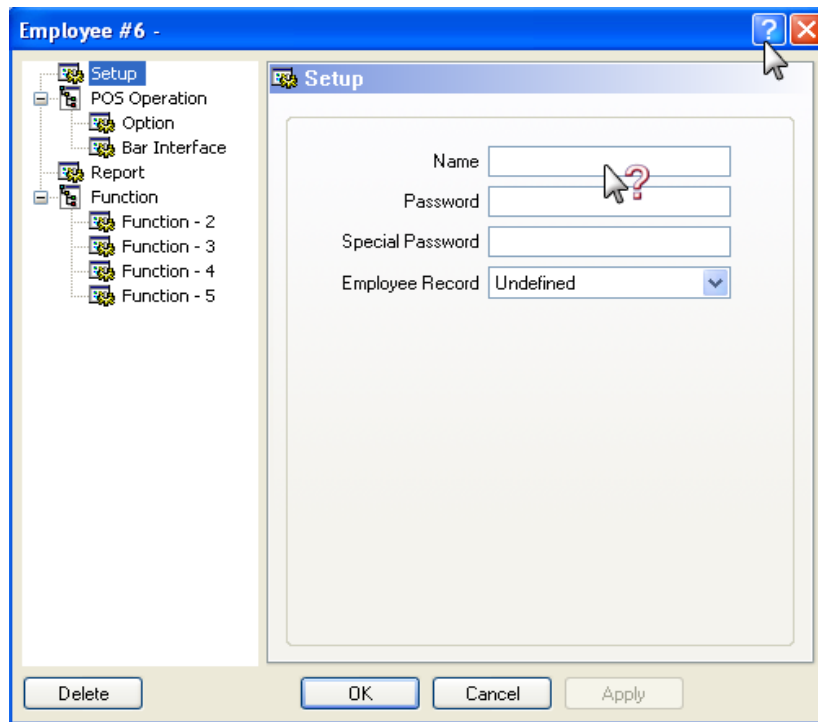




Maitre'D tip:

Whenever you are making changes in the back office you have access to a contextual help menu.

Click on  and click on the area you want help with – see below



For general information on **Maitre'D** and other products and services from Posera Software Inc; please visit our websites at www.posera.com and www.maitredpos.com.